InnoVia™ MLS System
User Manual

MarketLinx, Inc.
InnoviaSupport@marketlinx.com
Phone – (800) 334-0831
Fax – (336) 547-2723

MarketLinx would like to welcome you, and take this opportunity to thank you for choosing the InnoVia™ MLS System.

Learning a new system can be a very overwhelming experience. It is time consuming and at times a bit stressful. Our goal is to make this transition as painless as possible.

After this training class, we suggest that you review this workbook periodically. Marketlinx created this workbook for you, the User, and we feel that it can be a valuable tool in the learning process. Please make notes during class of anything that may not be clear to you, or of any questions you may have in the “notes” section at the end of the workbook. At the end of the training class, the instructor will have a question-and-answer session, during which you will have the opportunity to clear your confusion and/or find the answers to your questions using your notes as reference.

At MarketLinx, we believe in team work. We strive to help the Users of the InnoVia™ System become familiar with the system’s capabilities and to guide them to the most efficient methods of meeting their MLS needs. We look forward to a bright and productive future with you, our newest members.

InnoVia™ MLS System
Table of Contents

InnoVia™ System Requirements……..……5
Getting Started....6
Browser Optimizer....7
For AOL....9
For All Other ISPs....9
Logging In....10
My InnoVia™ Page....12
Customizing the My InnoVia Home Page....13
My Inventory, Firm Inventory, & My Expiring in 30 Days....15
Manually Mapping Listings....16
Add Links of Interest....18
Message Center – Board News and Bulletin Board....19
Bulletin Board Maintenance....20
The Look and Feel of InnoVia™....21
Searches....22
Coded Features....29
Getting Search Results....31
Display Types....33
E-Mailing Listings....41
Printing from InnoVia....43
Utilizing the Use Checked Function:....44
Driving Directions....49
Slide Show....52
My Listing Cart....53
Performing a CMA....55
Horizontal CMA....59
Saving your CMAs....60
CMA Displays (PDF)....62
Utilizing Download Functions....63
Downloading to a Spreadsheet....65
Prospect Manager/ Prospect Listing Cart....66
Saving Prospects from Search Screens....76
Modifying Prospects from Search Screens....78
ProspectPRO....79
Buyer Match....88
Saving a Search....90
Map Based Search....92
Hotsheet Searches....100
Saving a Hotsheet Search/ Set up e-Hotsheet....103
Reports....105
Agent Market Share Report....108
Firm Market Share....112
Financials....116
Standard Forms....117
Listing Maintenance....119
Modify Existing Listings....119

Adding a New Listing....124
Cloning Listings....126
Saving a Partial Listing....127
Partial Listing Auto-Save....128
Virtual Tours....129
Delete My Listings Files....130
Agent Maintenance/Modifying Contact Information....132
Alias Feature....134
Firm Maintenance/Modifying Firm Information....136
Photo Upload Utility....138
Agent Photo/Firm Logo Upload....141
Listing Attachments....142
Preparing an Attachment for Upload....144
Uploading Listing Attachments....145
Faxing In Listing Attachments....148
Comprehensive CMA....150
Building Custom Displays....176
Building a One-liner Display....176
Building a Detail (Full Page) Display....184
Cloning and Copying From Existing Displays....195
Adding Displays to InnoVia....197
Custom Search Forms....198
Troubleshooting – Error Messages....201
Page Cannot Be Displayed....201
Error On Page/JavaScript Errors....201
Warning: Page Has Expired....202
"DB_doins" errors....202
Please Check Appropriate Box to Enable Changes....202
This Item Is Mandatory....203
Rule Constraint Error....203
You Are No Longer Logged In....204
Windows Cannot Open This File....205
Troubleshooting – Common Problems....206
InnoVia Menu Bar Does Not Appear....206
How to Clear your Cache: Internet Explorer (Temporary Internet Files)....207
Emails Not Being Received....209
Pictures not Appearing on Listings....210
Can't See Entire Screen – Screen Resolution....210
Issues With Pop-up Windows....211
Support Options....212

InnoVia™ System Requirements

To operate efficiently while using InnoVia™, we recommend that your PC meet the following minimum requirements:

Operating System
•Windows 2000*, XP, or Vista
•Mac OS X (must use Firefox web browser)

Processor
•Minimum – At least 500 MHz
•Recommended –700 MHz

Memory (RAM)
•Recommended – 256 MB for Windows 2000, XP or Vista

Browser (Browser requirements vary from Board to Board. For your specific system, you may need to check the login page of InnoVia™ for browser requirements)

•Internet Explorer – 6.0 or greater
•Firefox – version 2
•AOL (or others) – Minimize AOL browser and use Internet Explorer or Firefox

Modem
•Minimum – 56K
•Recommended – Cable, DSL, or T1

Video
Screen Resolution is recommended to be set at 1024 × 768 (instructions for checking this are in the “Tips and Troubleshooting” section of this book).

*Windows 2000 is sufficient for use with online InnoVia™, but you will need Windows XP or above for Personal InnoVia™, our offline product

Getting Started

Before you log into InnoVia™, it is recommended that you check the following:

- Make sure you have been assigned a User-ID and Password – contact your local office in the event you do not have this information.

- Make sure you have an updated Internet Browser. (To download the latest Internet Explorer or Netscape browser, refer to the login page of InnoVia™)

- Make sure your screen resolution is set to 1024 x 768. (For instructions on how to check your screen resolution, see the Troubleshooting section of this workbook.)

- Configure your pop-up blocking software to allow pop-ups within the InnoVia™ website address (For instructions on how to configure your pop-up blocking software, see the Troubleshooting section of this manual.

- Set up the InnoVia™ website address as a “Trusted Site” within your internet options.

- Most of these settings can be configured by running the “Browser Optimizer” discussed on the following page.

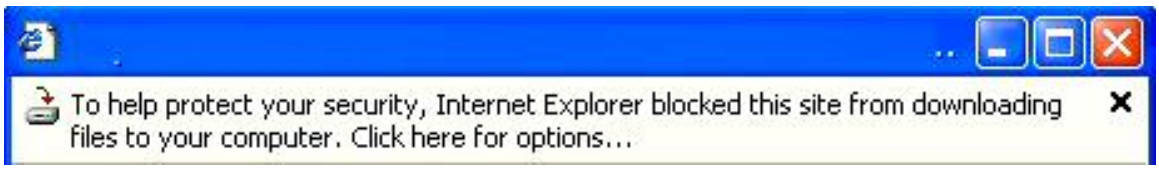
Browser Optimizer

Located on the login page to InnoVia™ is the Browser Optimizer. This is a tool that will check your Internet Explorer browser to make sure that is has the necessary settings for use with InnoVia™, and correct any settings that need to be changed. It is recommended that you run the Browser Optimizer before logging in to InnoVia™ for the first time. You will only need to run it once.

To run the Browser Optimizer:

- Locate and click the Browser Optimizer button on the InnoVia™ login page

- If you get a message in your browser like the one below, click on the information bar and choose “Download File” or “Install ActiveX Control”


To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options...

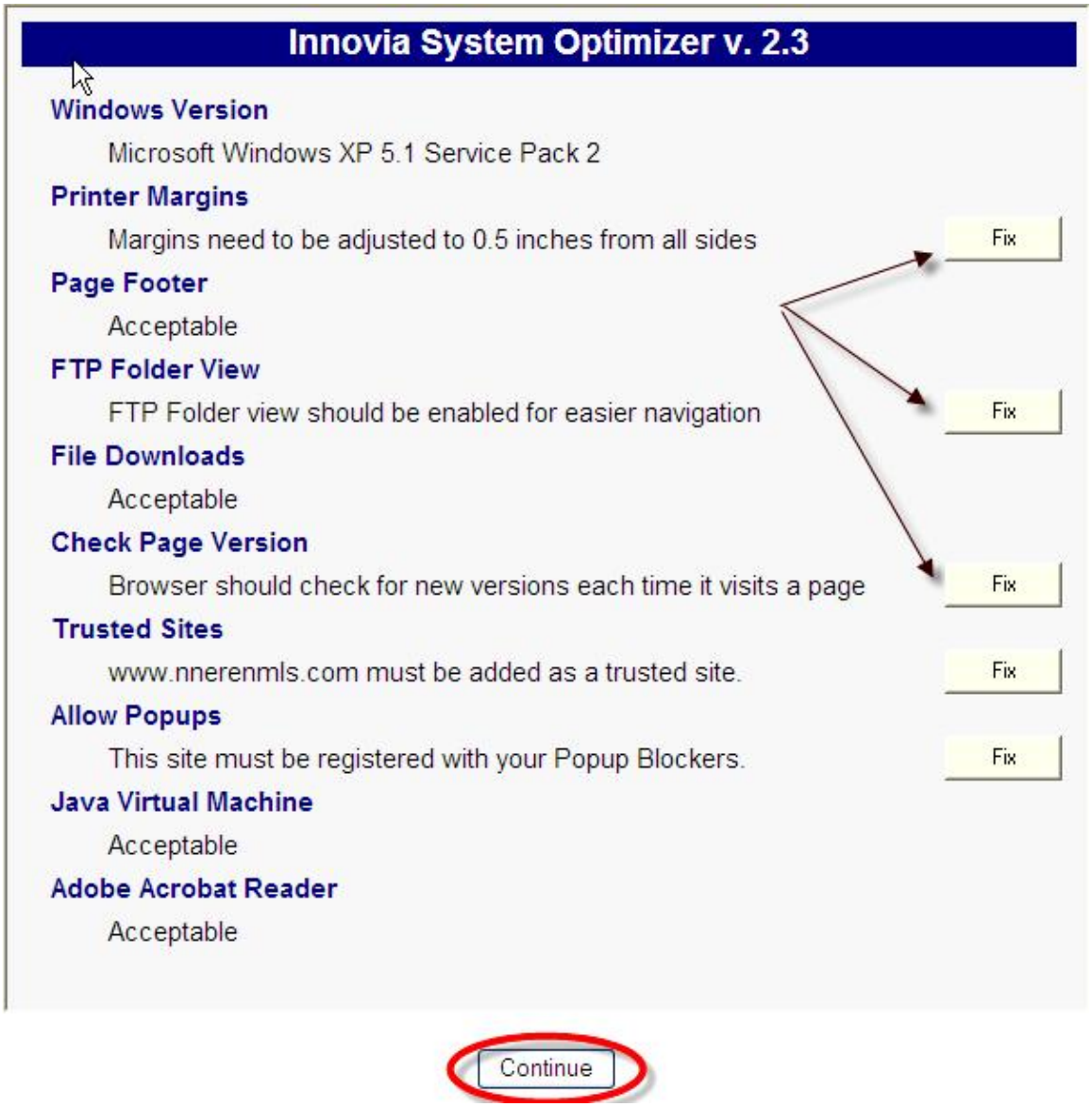
- You may also get a message asking “Do you want to install this software?” Click the “Install” button, and the Browser Optimizer will check your browser settings.

Internet Explorer - Security Warning
Do you want to install this software?
Name: Innovia System Checker
Publisher: Offutt Systems, Inc.
More options
Install
Don't Install
While files from the Internet can be useful, this file type can potentially harm your computer. Only install software from publishers you trust. What's the risk?

Browser Optimizer (cont)

On the next screen you will see a list of browser settings. If any of them need to be changed, there will be a “Fix” button out to the right. Simply click on all of the “Fix” buttons, and the necessary settings will be changed.

Once you have fixed all the settings, click the “Continue” button at the bottom.



Note: if you need to install Java Virtual Machine, you will be directed to a website where you can download the latest version of Java.

For AOL

Please connect to the Internet as you normally would, minimize the AOL web browser, and open an Internet Explorer web browser.

For All Other ISPs

Connect to the Internet as you normally would.

Once connected, click in the address bar at the top of the browser. Once the address is highlighted, type in the URL (web address) given to you by your association, or by the MarketLinx trainer that taught your class.

Once the address is typed in to the address bar, click the “Go” button at the right of the address bar, or hit the “Enter” key on the keyboard. This will take you to the login screen.

You may wish to make InnoVia™ one of your “Favorites”. From the Login page, click on “Favorites”, then “Add to Favorites”.

It is also possible to place a shortcut on your desktop if you wish. From the Login page, right-click on an empty area of the screen (not on a picture or text), then left-click on “create shortcut”. A message will appear to let you know a shortcut was placed on the Desktop. Click OK. From that point on, all you have to do to get into InnoVia™ is double click the new icon on your desktop to access InnoVia™.

Logging In

InnoVia™ is a log-in/password protected site. This means that you are required to have an assigned User-ID and Password to gain access to the system.

Logins are codes created by the MLS Administrator at your local board office. Logins are usually entered in lowercase letters, but some boards choose to use uppercase letters.

The Password is created by your Association and can be changed by following the instructions in the "Agent Maintenance" section of this book. Your password is private and used to ensure that access to confidential listing information is given only to the Listing Agent. It is composed of several upper and/or lower case letters and/or numbers. Users cannot, however, enter symbols or spaces in a password – letters and numbers ONLY, and they are case sensitive.

InnoVia™ recognizes valid users by three details:

1) Login (or User-ID)
2) Password
3) Security Level (Agent, Broker, Board member, etc.)

When a new user is added, the Agent's number is matched to his/her login and password. This allows InnoVia™ to recognize information belonging to them alone, and thereby enforces strict confidentiality.

Once you have been assigned a User-ID and Password, you are ready to start using the InnoVia™ MLS system.

To get to the site, you will need to establish an Internet connection, enter the assigned web address into your browser address field, and either hit the Enter key or click on GO.

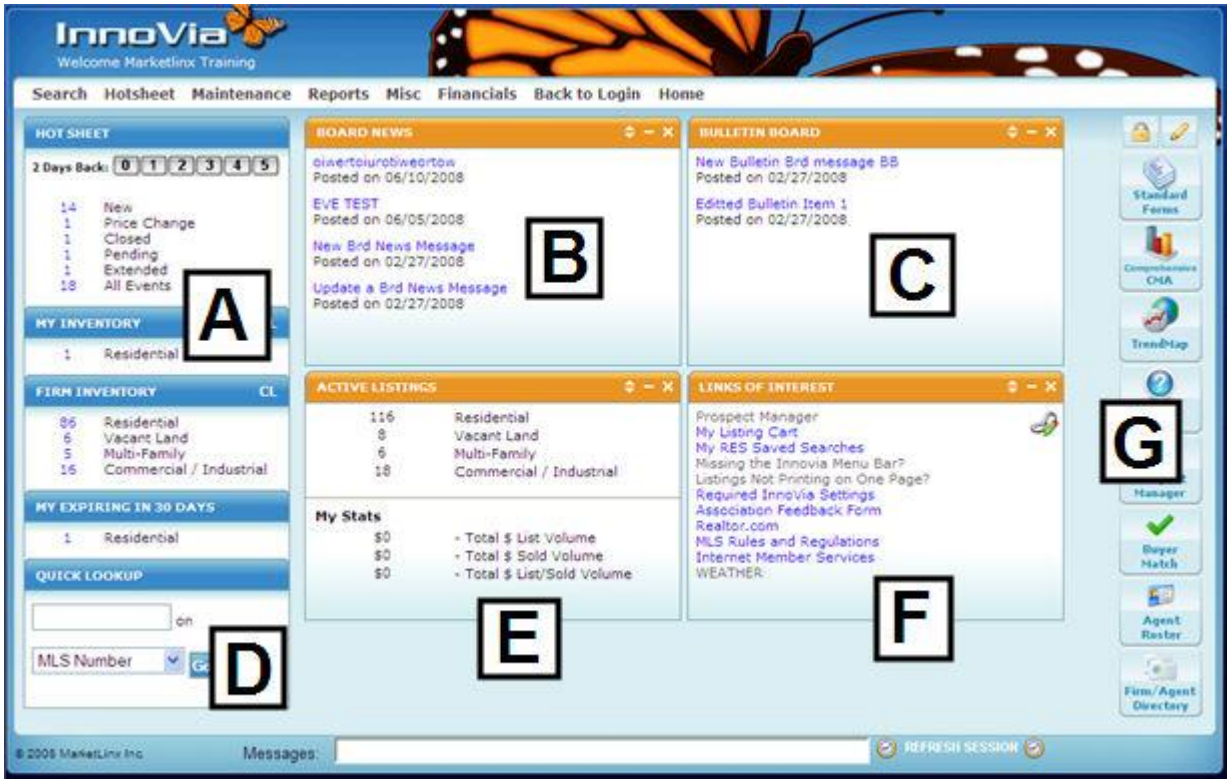
The InnoVia™ login screen will then be displayed similar to what is shown on the following page.

This screen contains two text boxes, one for your User-ID and one for your Password, along with a command button labeled “Log In”.

Enter your User-ID and Password in the appropriate boxes and click “Log In”, or hit the Enter key on your keyboard.

My InnoVia™ Page

After logging in to InnoVia™, you are greeted by the "My InnoVia™" page. The My InnoVia™ page provides easy access to all of the most commonly used MLS items. See descriptions below.



A My Links:

- Quick links to Hotsheet information, with "Days Back" function.
- "My/Firm/Office Inventory" – Links to your active, pending, and closed inventory.
- "My Expiring in 30 Days" – Keeps you informed of all your listings that will expire in 30 days or less.

B Board News: These items are available immediately after login.

C Bulletin Board: Agents may post items here, such as price reductions and open houses.

D Quick Lookup: Select the type of lookup (list price, MLS#, etc), then input the criteria, and click "Go".

E Quick count of MLS listings for each property type, and a quick summary of your Year-to-Date sales stats.

F Links of Interest - Access your prospects, saved searches, personal website, IDX site, helpful websites and more just by clicking the links! Add your own links too!

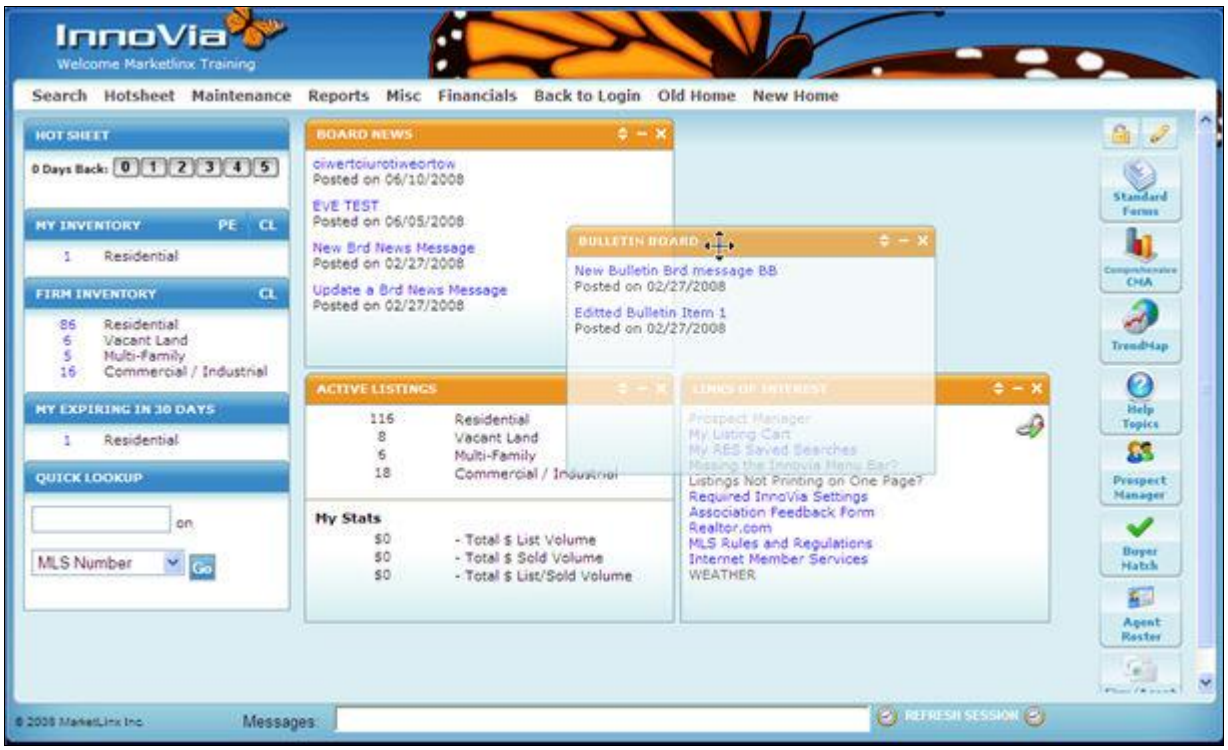
G Graphical Button links to Standard Forms, Help Topics, Comprehensive CMA, etc.

Customizing the My InnoVia Home Page

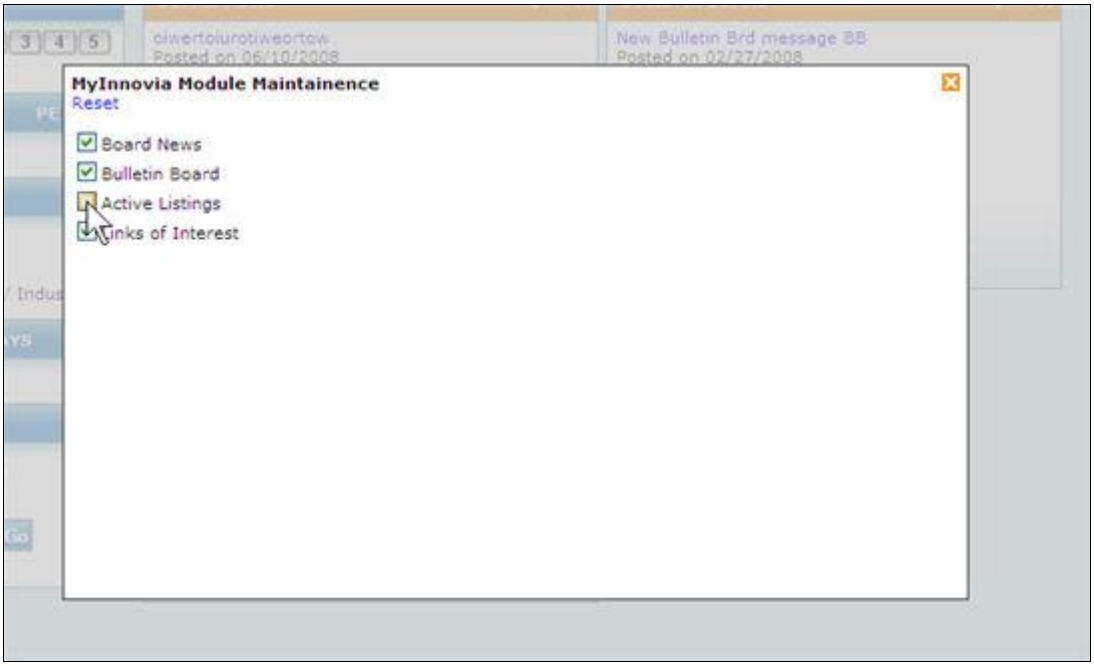
You now have the ability to customize your home page by moving several of the modules around to create a different layout. You can also hide these modules from showing on your home page to simplify the layout. Movable modules include those in the middle of the home page, such as Board News, Bulletin Board, Active Listings, and Links of Interest.

To move a module, you will need to unlock the home page, by clicking on the little pad lock in the upper right corner of the page, so that it appears unlocked.

Then, simply click and drag the modules around on the home page and place them where you would like. Moving them on top of another module will either swap the two, or shift the rest over. Play around with it until you get the feel, you won't break it!

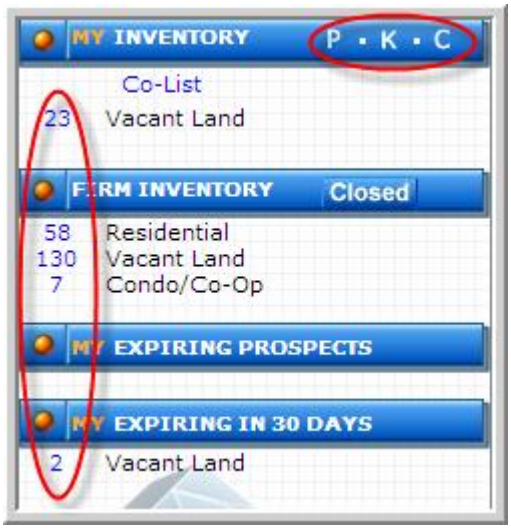


To hide any of the modules, click on the little pencil icon next to the pad lock. This will open the Module Maintenance screen, where you can un-check any of the modules to hide them. There is also a **Reset** link to reset the screen back to the default. When finished, simply close the window by clicking the red X in the upper right corner.



My Inventory, Firm Inventory, & My Expiring in 30 Days

"My Inventory", "Firm Inventory", and "My Expiring in 30 Days" provide access to your listings, the firm's listings, and any of your listings that are about to expire.



To retrieve the active listings, click on the number out to the left of the property type. This will retrieve a one-liner display of each listing under that property type.

To see all of your "Pending" (P), "Contingent" (K), or "Closed" (C) listings, click on the corresponding buttons.

Once you pull up the listings in a one-liner display, you have the option to click on the MLS Number to view the full details about each listing.

SEL	PT	MLS#	ST	Address	Town	State	Listing Price	Frm	Ofc	Agt	Expire Date	Edit	Map	PDF Upld	Pho Upld
☐	R	2607448	AC	111 Test Listing RES Drive	Canton	ME	$9	OFFUTT	0	OSIQA	08/01/2006		MAP		
☐	R	2607435	AC	125 Main Street - RES	Barnstead	NH	$4,400	OFFUTT	0	OSI45	06/25/2006		MAP		

In Firm Inventory, only Brokers and Administrators will have the ability to Edit and Map those listings.

If you wish to edit the details on a particular listing, click the "Edit" icon.

To correct the map of your listing, click the "Map" link.

To upload PDF documents to a listing, click the paper clip icon.

To upload photos to a listing, click on the camera icon.

Details on how to correct the map for your listing are on the following page.

Manually Mapping Listings

When a listing is uploaded into InnoVia, it is plotted on the map, using Virtual Earth's mapping database. If, for any reason, your listing is plotted in the incorrect location, you can easily update it on the map, so everyone else in the MLS will see it in the correct location.

First you will need to pull your listing up on any map. There are a several different ways to do this, just use the easiest one, based on where you are at in InnoVia.

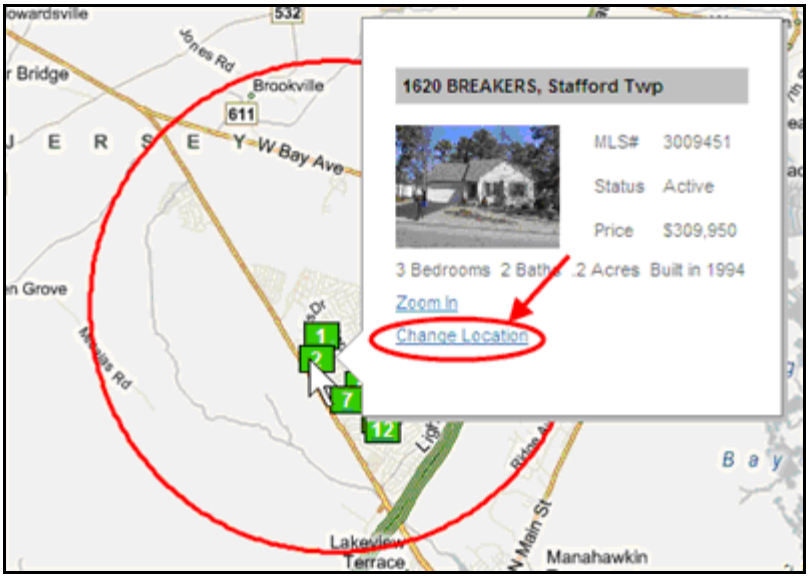
- From the My InnoVia Home Page, click on your listings from the My Inventory or Firm Inventory sections on the left. Click on either the address link or the red map button.

- Access a property type search page and search for the listing using either the map-based search, or any other criteria, such as the MLS number. It's ok if there are other listings on the map results page as well.

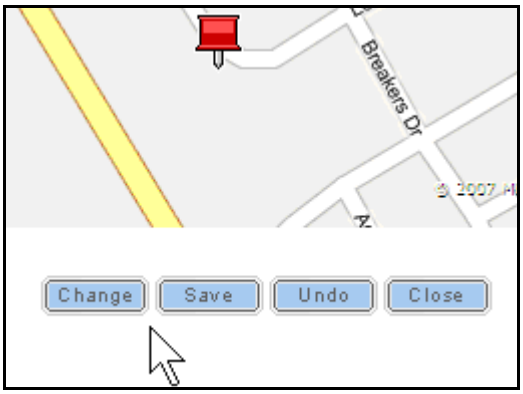
- Use the Quick Lookup tool on the home page to search for the listing by MLS number, and click on the address link from the oneliner.

Once you are viewing your listing on a map, follow these steps.

1. Hover your pointer over the property you would like to geo-code. As long as it's one of your listings, there will be a link to "Change Location", click this link



2. A new window will open with buttons to update your listing on the map. Any other listings on the map will temporarily disappear. If necessary, move the map to the area where the property should be located (click and drag to move the map).



3. Click the **Change** button under the map.

4. Click on the desired location for the property.

5. Click on the **Save** button when you are satisfied with the new location. If you need to revert back to the previous location, click **Undo**.

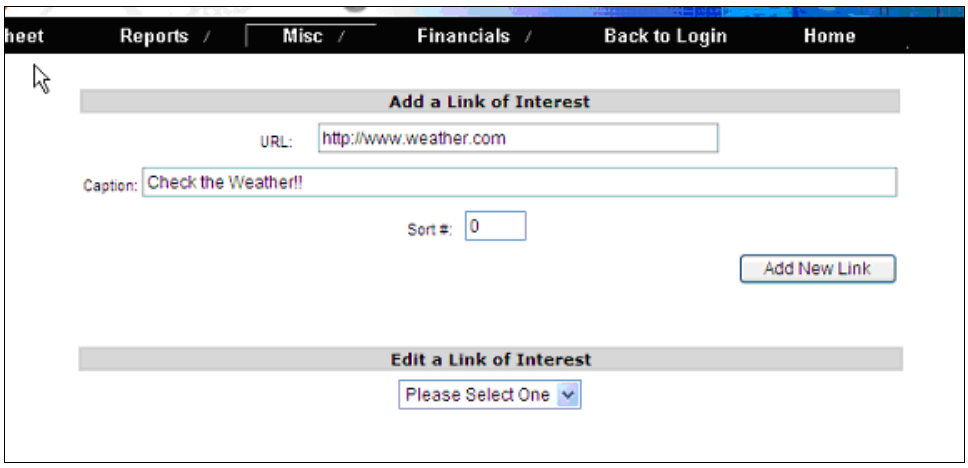
Once you save it, click **Close**, and the listing will show in the new location for anyone else viewing it on the MLS, and if applicable, the rest of your search results will reload on the map.

Add Links of Interest

You may have the ability in your MLS to add your own links under the "Links of Interest" section of the My InnoVia page. These can be links to any other web sites that you use on a regular basis. Placing a link here gives you quick access to these sites while in InnoVia, without the need to open another browser and type in the web address. To add a link:

- Click on the "Edit" button under the Links of Interest section, on your home page in InnoVia

- From the next screen, enter the URL (web address) of the link you are adding, enter a caption (what you want to actually show on the home page), and choose a sort # (zero will sort alphabetically)
- Click on the “Add New Link” Button. Your link will now be available on the home page.



Message Center – Board News and Bulletin Board

After logging in, your Board News will be displayed on the "My InnoVia™" page. Your local board office is responsible for the maintenance of this information.

The Bulletin Board contains messages and or announcements entered by members. For most boards, the Bulletin Board appears alongside the Board News on the "My InnoVia™" page (unless you have previously customized your home page)

To read a Board News or Bulletin Board item, simply click the message link and it will open in an expanded window. From there you can print the message out, or click "Go Back" to return to the rest of the home page. The following page will detail how to enter a Bulletin Board item.

Bulletin Board Maintenance

To maintain your Bulletin Board messages (add, edit or delete), from the navigation bar click on “Maintenance”, then select “Bulletin Board Maintenance”.

Adding a new Bulletin Board item

To add a new one, from the search screen, click the Add New button on the left.

Fill out the form.

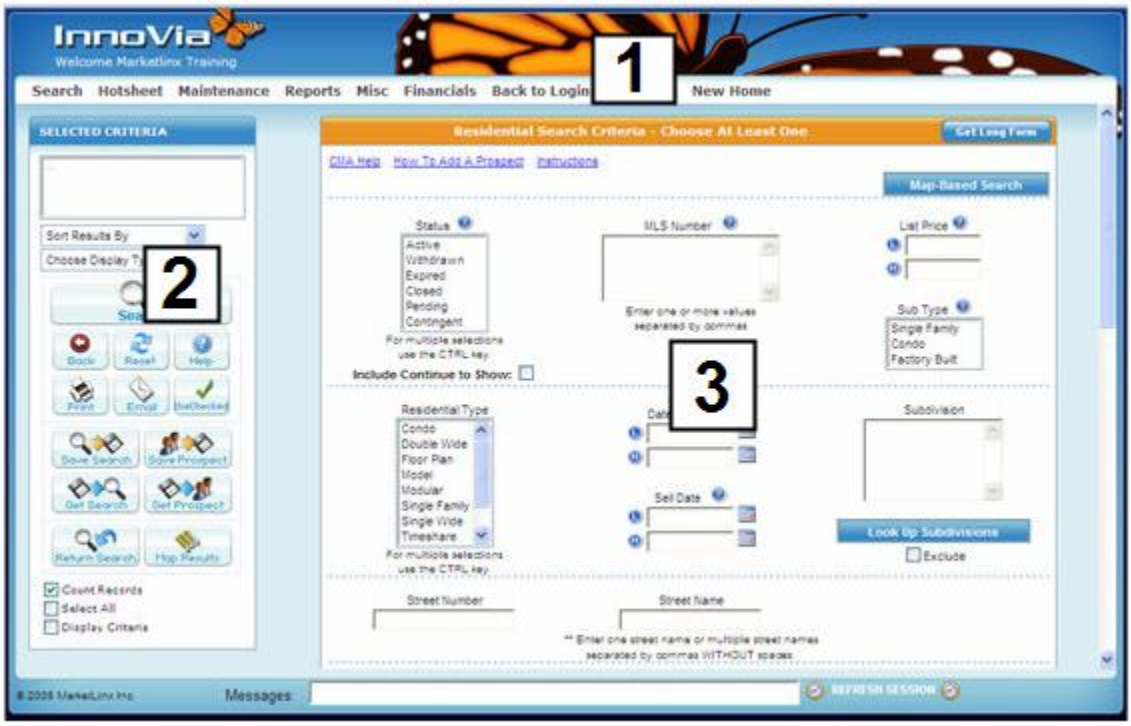
- Effective date - date the message will show on the MLS
- Expiration date - date the message will drop off the MLS
- Enter the MLS number if applicable
- Depending on your MLS, you may have options to select a particular city or area, and the message will show only for agents who have selected that area in their personal profile.
- There may also be an option to select a Bulletin Type, making it easier for other MLS users to sort through all the bulletins on the home page.
- Headline - this is what is visible from the Bulletin Board to everyone
- Details - the actual message of your bulletin

Click **Save** on the left when finished

To edit an existing message, simply search for it using the same Bulletin Board Maintenance screen, click on the ID number, and edit the necessary fields. Be sure to click “Save” when finished.

The Look and Feel of InnoVia™

Most of InnoVia's pages are comprised of frames. There are three frames on the page, as shown below.



1 Consists of the navigation bar and the InnoVia™ logo. The navigation bar (or menu bar, is it is sometimes called) allows you to navigate through each function in the InnoVia™ MLS System. The navigation bar is always present no matter what screen you are on in InnoVia™.

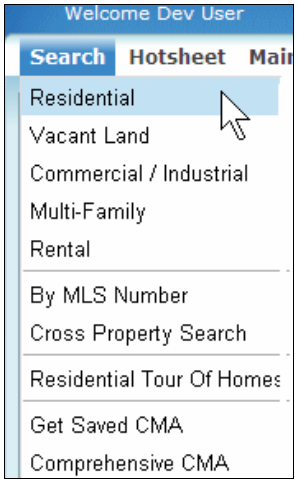
2 Includes the box labeled "Selected Criteria", the drop down menus, and the command buttons. The command buttons complete various functions when you are working in the web pages.

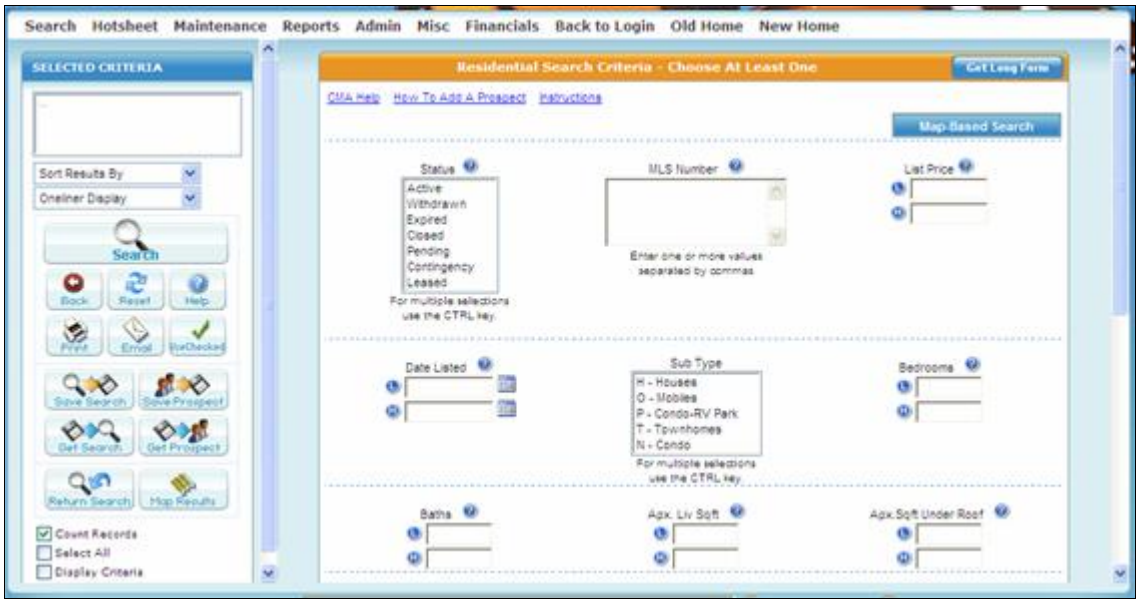
3 This is the largest section of the web page, (as shown in the visual example provided above) and includes all of the search criteria available for searching.

Searches

To Search for listings, start by clicking on the “SEARCH” tab on the InnoVia™ navigation bar. A drop down menu will appear. This menu gives you the option of searching by a particular property type, or by all property types at once. Searches done across all property types will have fewer search criteria from which to choose.

Arrow down to the type of search you would like to do and click it. A search screen will appear (shown below).





You will see the following items on the left side of the search screen:

Help: This will direct you to InnoVia's help system, should you need help on any topic.

Return to Search: After running a search, this will bring you back to the search page, while retaining all of your criteria.

Map Results: This will plot all of your search results on a map. This can used after you have run your search, or you can use it to initiate your search, instead of clicking "Search".

Selected Criteria: As search results are selected, the items are listed in this window.

Sort Results By: This allows you to sort the results of your search by MLS number, address, listing agent, or by other options. To select a sort order, click on the drop-down arrow and choose one of the options listed. This can be done before or after a search is initiated.

Choose Display: This allows you to choose how to display the results of your search. To select a particular display type, click on the drop-down arrow and choose one of the options listed. This can be done before or after a search is initiated.

Search: Clicking on this button initiates a search.

Back: This button takes you back to the previous screen.

Reset: Clicking this button refreshes your search screen, clearing all search criteria fields.

Use Checked: This function is used after you have your search results displayed and will be covered in the "Using Results" section of this workbook.

Save Search/Prospect: These buttons allow you to save searches and set up prospects.

Get Search/Prospect: These buttons allow you to edit saved searches and prospects.

Print: Clicking this button prints the listings shown in the right hand frame.

Email: This button allows you to email displays; it will be covered in the "Using Results" section of this workbook.

Count Records Checkbox: This is checked by default. This function counts the number of listings that the system found matching your criteria and displays the information in a pop-up window when you click "Search".

Select All: This checkbox allows you to select all displayed one-liners at once; it will be covered in the "Using Results" section of this workbook.

Display Criteria: When this box is checked, the criteria selected for the search will be shown at the bottom of the one-liner display. This will be covered in the "Using Results" section of this workbook.

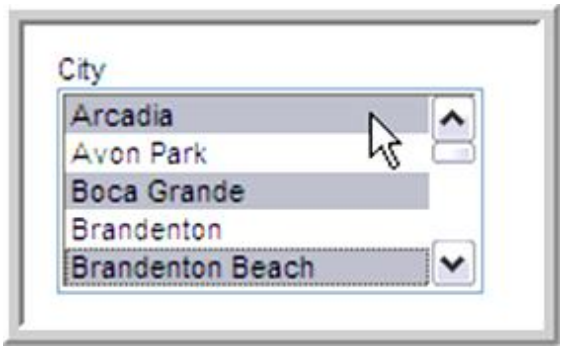
The search criteria options are on the right side of the search screen.

Search Criteria: You must select at least one item in this area in order to perform a search.

Extended Search Criteria: This area allows you to search by specific features, and is optional. You may have to click on the arrows at the top of the search screen in order see the extended criteria options. This depends on the design of your system (see below).

The search screen includes three types of search fields – **choice lists, range fields** and **entry fields**.

Choice List: To select criteria from a choice list, simply click on the item you wish to search by. Some of these lists require that you scroll down to get to a certain item. Hold down the "CTRL" key on your keyboard to select more than one item, or to de-select an item selected in error.



TIP: To avoid scrolling, click anywhere in the box and hit the key of the first letter of the item you want to search by.

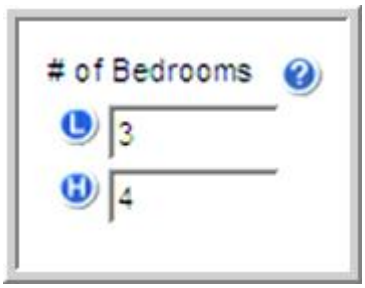
For Example: To select a subdivision named "Westmore", click anywhere on the subdivision list, hit the "W" key, and scroll down until you find "Westmore". This function only works for the first letter of the subdivision name. So typing "WE" would not take you to the subdivisions beginning with "WE", but would take you to the subdivisions beginning with "E".

You may select more than one item in a choice list by holding down the **"CTRL"** key on your keyboard while clicking on an item. If, after you have selected your criteria, you choose to eliminate one of the selected items from a choice list, hold the "CTRL" key down and click on the item you want removed from the search.

Range Fields: Have an "L" for Low and an "H" for High. This allows you to search a range.

An example would be:

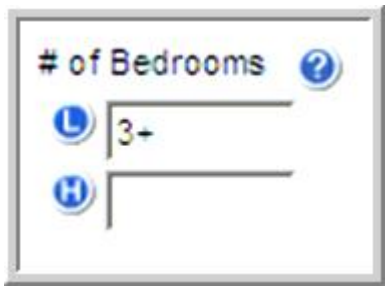
# of Bedrooms
L 3
H 4

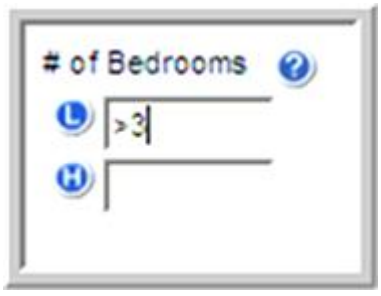


Tip: If you would prefer not to use a specific range, you can type >3 or 3+ in the "L" field (leave the "H" field blank). Basically, this tells the system to look for listings that have more than 3 bedrooms, or 3 or more bedrooms (see the examples below).

In the price field, you are not required to enter the dollar sign, or any other punctuation. Just type in the numbers.

For Example: For a list price of $100,000, you only need to type 100000. Also, as noted above, you can use the <, >, +, or - symbols if you would prefer not to use a range. Entering 100000 in the "L" field and leaving the "H" field blank will only find listings that are EXACTLY $100,000.

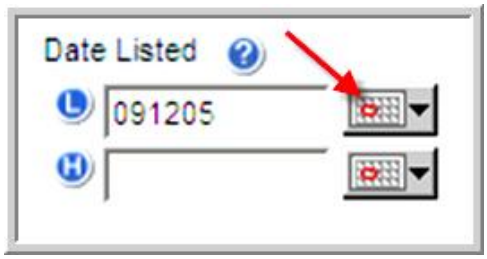




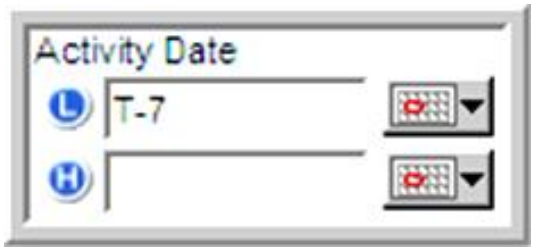
Date range fields do not function like other range fields. You are required to enter a range of dates if you wish to use dates as part of your search criteria.

Tip: To type in a date, you DO NOT have to type in slashes or dashes. You simply type in the month, day and year as follows: 010101 – the field will populate as 01/01/01 automatically.

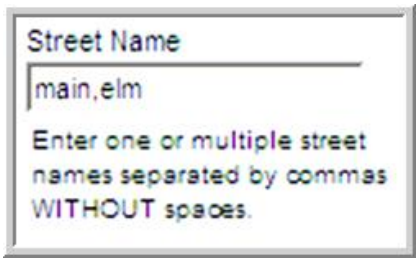
You can also use the calendar buttons to right of the date ranges to select the date you want.

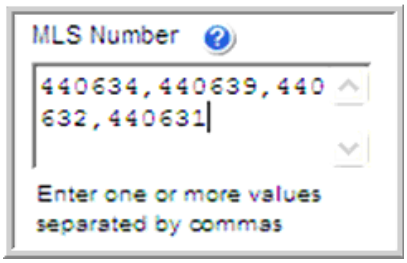


Tip: When searching by dates, you can either enter a date range, or do a "T-minus" search (Today minus X-number of days). In this example, the system would search for Activity Dates over the last week.



Entry Lists: Require that the user type in the desired search criteria. Entry lists operate on an automatic wildcard basis, which means partial names may be entered. You can enter multiple values separated by a comma WITHOUT spaces.





Entry Lists operate on an automatic wildcard basis. For example, you are trying to find a property on “Smith” Street, but you are not quite sure how the listing was entered into the system. It could have been entered as “Smith St” or “Smith Street”. To find the listing, you could type “smith” in the street name field and the system will automatically pull all the listings with “smith” as part of the street name, regardless of capitalization or street type.

To search for multiple street names at the same time, enter complete OR partial street names into the field, separated by commas, but NO SPACES, (for example: elm,birch,maple).

This leads to another feature that is available, called a “Keyword” search. This function allows you to search a listing’s marketing remarks for items that are not available as searchable criteria. To do this you go the “Keyword” search field and type the word you would like the system to find.

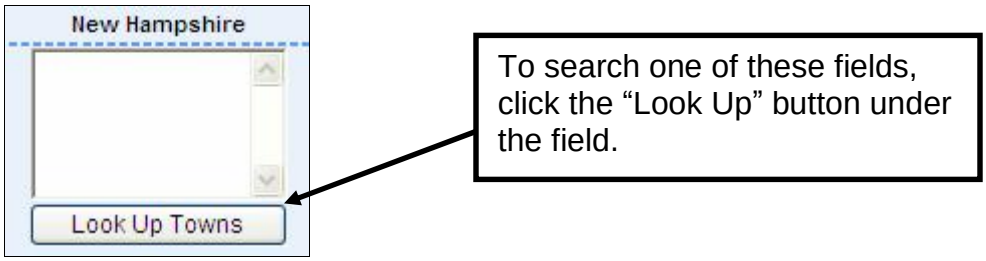
For example, if you would like to look for multiple keywords (ex. pool, swim, or water), type in the words you are searching for, separated by commas, but NO SPACES. Upon initiating a search, the system will check for the words “pool” “swim” OR “water” in the remarks section of listings meeting all other selected search criteria.

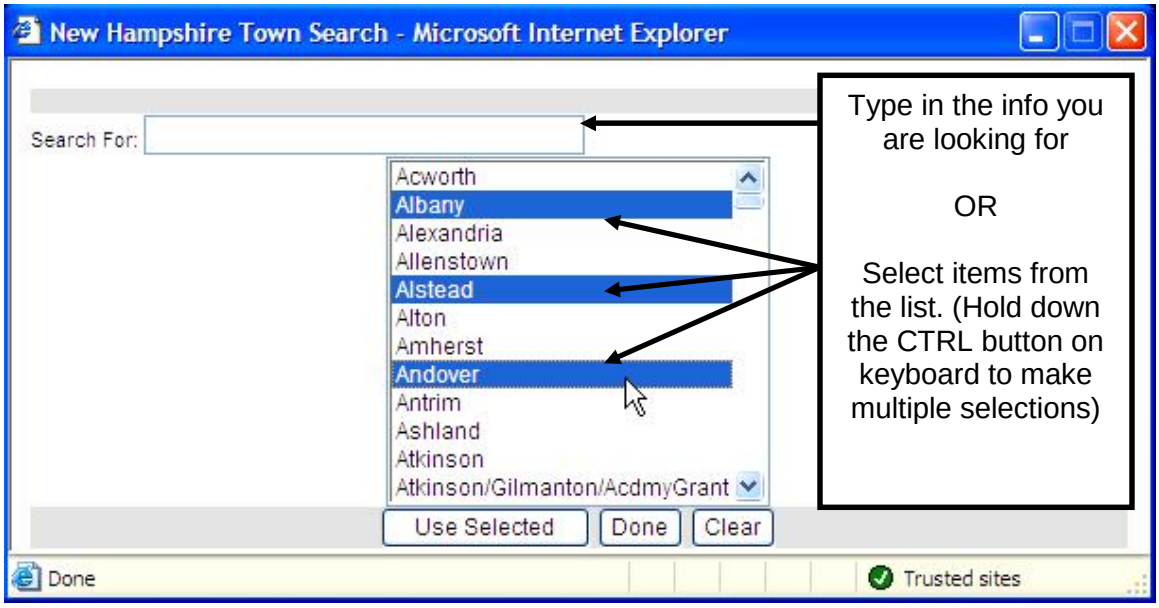
Note: If you are searching for specific listings, you can also search for properties using MLS Numbers. If all of the listings you are searching for are of the same property type, use the MLS# field on that property type’s search screen. If the listings are of differing property types, you should go to “Search” and “By MLS#”. Enter the MLS Numbers in the ML Number field, and click the Search button.

When entering multiple numbers, separate each MLS Number by a comma, but no spaces.

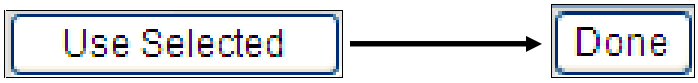
Depending on your MLS, you may also have fields that use a “Look Up” button to input the criteria.

Look Up Towns/Cities/Subdivisions





Once you have found the items you would like to include in your search, click on the “Use Selected” button. This will populate the search field with the criteria you have selected. Then click on the “Done” button, and you will taken back to the search page.

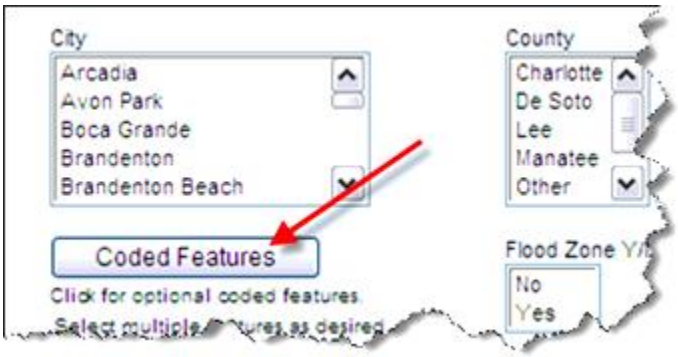


Look Up Firm/Office/Agent

Your search pages may also contain Look Up buttons to search for listings by Firm, Office, or Agent. Simply click the “Look Up” button, type in search criteria for whom you are looking for (you do not have to fill out every field, only one), and click “Submit”. You will then see a drop down list where you can choose the Firm, Office, or Agent, and that ID will be populated into that field on the search screen.

Coded Features

Coded Features: To search for certain features, such as the type of flooring, heating and interior features, and so forth, click the "Coded Features" button on the search screen.



The Coded Features screen will open. Check the coded features you would like to include in your search criteria.

Keep in mind that not all coded features are required when entering a listing, so choices made here will limit the number of results found from the search.

After checking the items to be included in your search criteria, scroll to the bottom or the top of the page and click the "Accept" button.

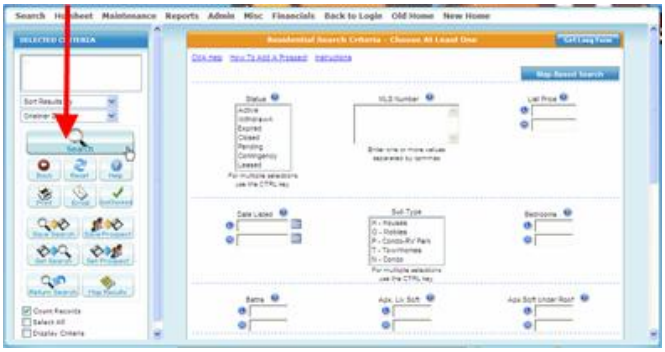
You may also exclude particular coded features from a search. To do this, check the box on the right side of the feature in question, next to the word “Not”. For example, if your customer is not interested in any listing that has a loft, check the “Not” box next to “Loft”, then click the “Accept” button at the bottom of the page, and continue with your search. All listings with “Loft” selected will be excluded from the search results.

NOTE: When searching FOR features, *OR* results in listings with 1 or more of the selected features, *AND* results in only listings with ALL of those features. When omitting features (NOT search), *AND* results in listings with NONE of the selected features. Do not use *OR* for a NOT search.

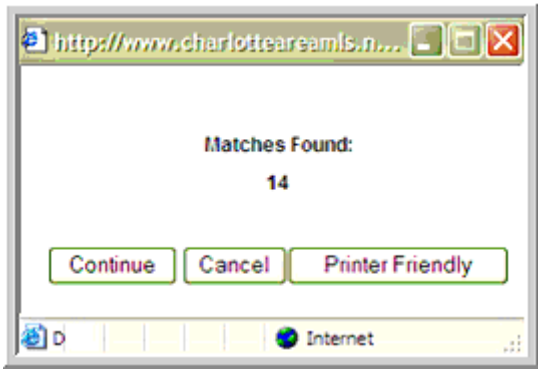
Getting Search Results

Once you have entered your search criteria, click the “Search” button on the left hand side of the screen to retrieve the listings. Once you click “Search”, a window will appear informing you of how many listings it found that met your search criteria.

Once you have entered your search criteria, click the “Search” button to retrieve the listings.



When the “Matches Found” box appears, click either “Printer Friendly” or “Continue” to retrieve the listings (“Printer Friendly” is recommended).



This window contains the following command buttons:

Continue: Clicking this button will take you to a display that lists the properties ONE PAGE AT A TIME. One page will display a set number of one-liners (usually 30), or a single full, customer, or multi-photo display.

Cancel: Clicking this button will take you back to the search screen. All of your selected criteria will still be displayed, allowing you to edit the criteria if desired.

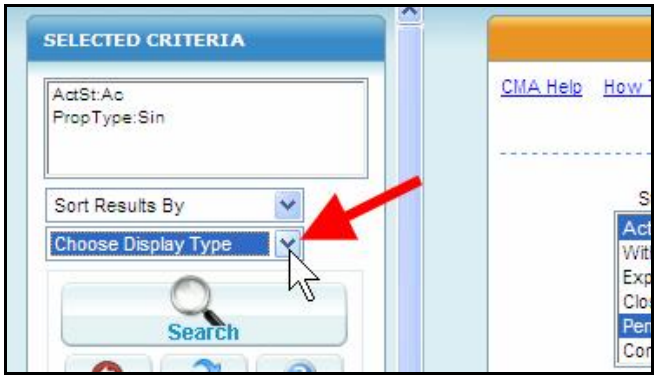
Printer Friendly (recommended): Clicking this button displays all search results on the screen so that you can print or view them all at once.

Once you click on either “Continue” or “Printer Friendly”, the listings will be presented in the standard one-liner format as displayed below (unless you selected to have the listings displayed in another format prior to initiating the search).

Sel	ST	MLS	PT	Address	City	BR	BA	HB	Pool	AC SqFt	Tot. SqFt	Yr Built	List $	LO	LA	DOM	
☐	A	485496	R	1198 VIRGO DR	Port Charlotte	2	2		N	1111	1637	1981	$175,000	AWRD	486160	53	6
☐	A	485870	R	2379 ALVET ST.	Port Charlotte	3	2	0	N	1200	2452	1985	$215,000	HCRE	310542	50	4
☐	A	480778	R	345 N SPRING LAKE BLVD	Port Charlotte	5	2	1	Y	1971	2005	1970	$250,000	CHGI	300678	78	11
☐	A	487752	R	18811 AYRSHIRE CIR	Port Charlotte	2	2	0	N	1435	2301	1985	$297,000	AWRD	311466	41	9
☐	A	601793	R	2204 CANNOLOT	Port Charlotte	3	2	0	Y	2089	2978	1987	$325,000	AWRD	306726	19	1
☐	A	477758	R	2402 COMO ST	Port Charlotte	2	2	0	Y	1595	2251	1987	$369,000	HRBR	351913	98	8

One-liner Display (Default Display)

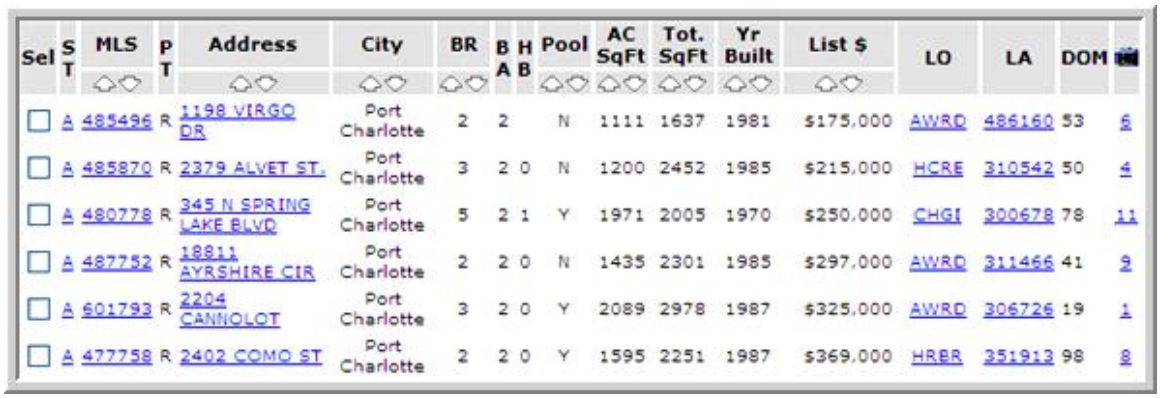
To browse listings using a display other than Oneliner Display, use the “Choose Display Type” dropdown on the left side of the screen.



Click on the drop-down arrow to view choices, then select your desired display type.

Display Types

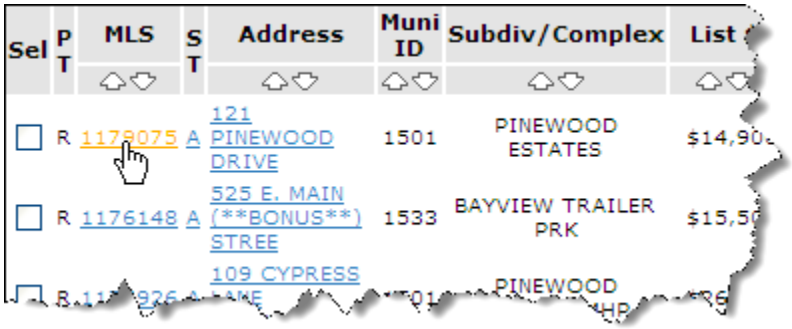
If you do not choose a specific display type prior to initiating your search, your results will be displayed in the standard one-line format, as shown below. *(Based on how the system was designed by your local board office, you may have display and linking options that are not covered in this section.)*



Sel	ST	MLS	PT	Address	City	BR	BA	HB	Pool	AC SqFt	Tot. SqFt	Yr Built	List $	LO	LA	DOM	
☐	A	485496	R	1198 VIRGO DR	Port Charlotte	2	2		N	1111	1637	1981	$175,000	AWRD	486160	53	6
☐	A	485870	R	2379 ALVET ST.	Port Charlotte	3	2	0	N	1200	2452	1985	$215,000	HCRE	310542	50	4
☐	A	480778	R	345 N SPRING LAKE BLVD	Port Charlotte	5	2	1	Y	1971	2005	1970	$250,000	CHGI	300678	78	11
☐	A	487752	R	18811 AYRSHIRE CIR	Port Charlotte	2	2	0	N	1435	2301	1985	$297,000	AWRD	311466	41	9
☐	A	601793	R	2204 CANNOLOT	Port Charlotte	3	2	0	Y	2089	2978	1987	$325,000	AWRD	306726	19	1
☐	A	477758	R	2402 COMO ST	Port Charlotte	2	2	0	Y	1595	2251	1987	$369,000	HRBR	351913	98	8

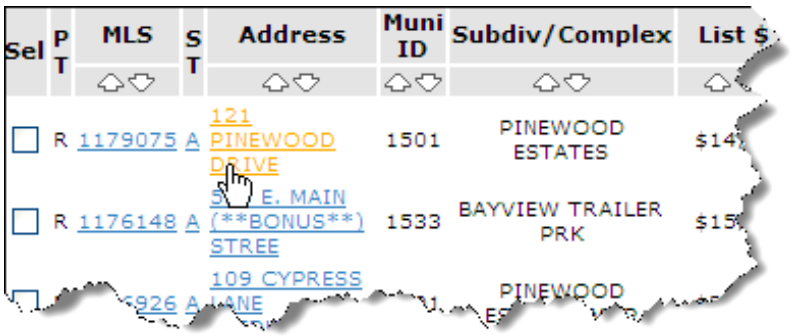
Oneliner Display

Clicking on the MLS number will take you to a full display of the property.



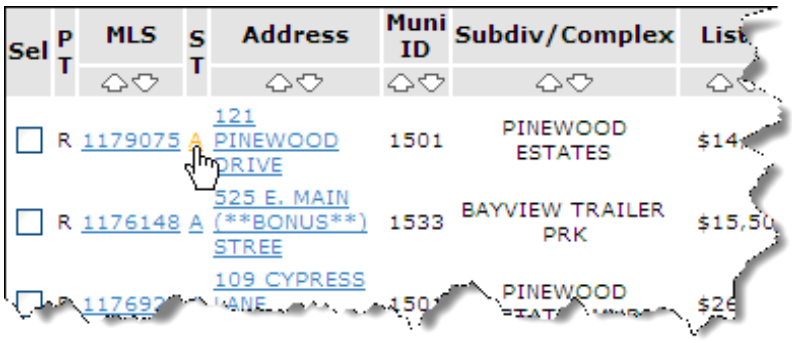
Sel	PT	MLS	ST	Address	Muni ID	Subdiv/Complex	List
☐	R	1179075	A	121 PINEWOOD DRIVE	1501	PINEWOOD ESTATES	$14,90
☐	R	1176148	A	525 E. MAIN (**BONUS**) STREE	1533	BAYVIEW TRAILER PRK	$15,5
☐	R	11		109 CYPRESS		PINEWOOD	

InnoVia™'s mapping function can display a selected property on an area map. You can view the map for a given property by clicking on the address link.

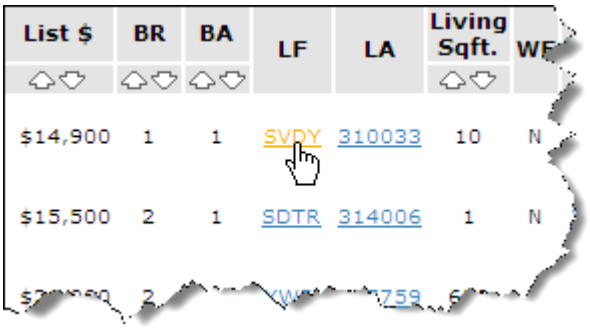


Sel	PT	MLS	ST	Address	Muni ID	Subdiv/Complex	List $
☐	R	1179075	A	121 PINEWOOD DRIVE	1501	PINEWOOD ESTATES	$14
☐	R	1176148	A	E. MAIN (**BONUS**) STREE	1533	BAYVIEW TRAILER PRK	$15
☐		926	A	109 CYPRESS LANE		PINEWOOD	

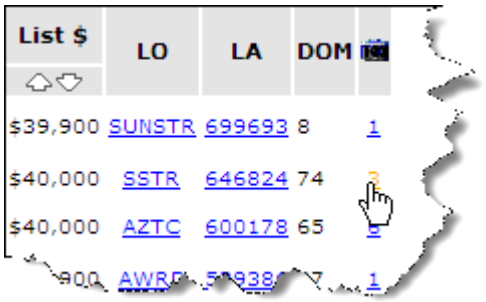
Clicking on the status type link will give you a listing history report for the selected property.



The listing firm ID and listing agent ID links will display the listing firm's and listing agent's contact information.



Clicking on the photo number link brings up a multi-photo display of the property.



The arrows in the header section allow displays to be sorted in ascending or descending order.

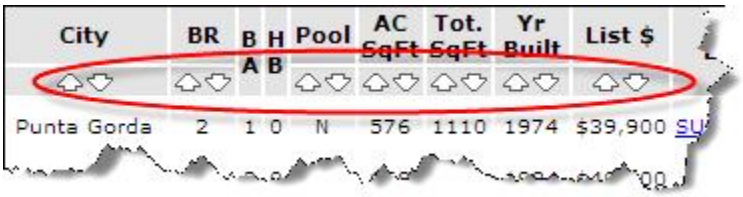


Photo Oneliner: A one-line display that gives basic information and a small thumbnail photo. Ascending and descending sort arrows are provided in the header area.

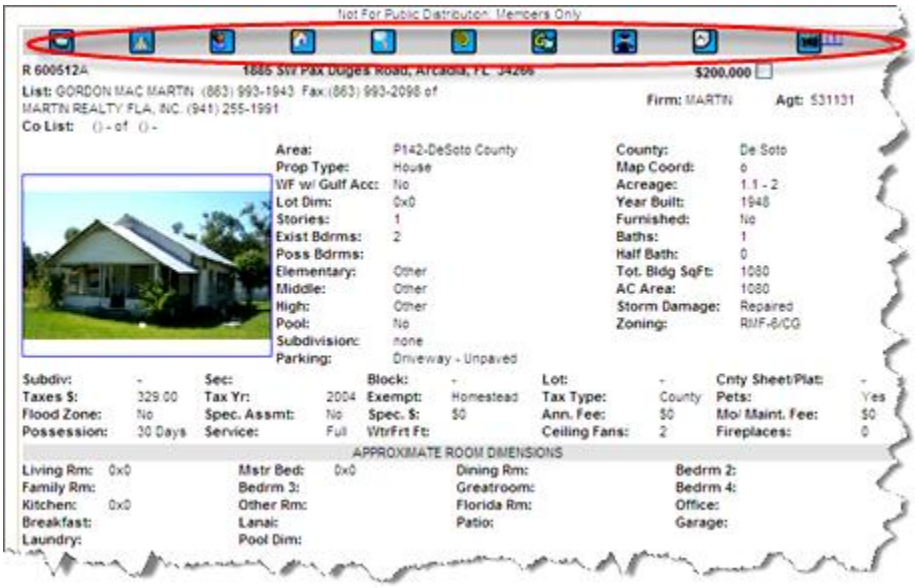
Sel	PT	List	ST	Address	City	Subdivision	Area	BR	BA	Liv SqFt	Parcel ID	List $	
☐	R	161	A	3 apple	4001	Accd Ranches	4001	1	3	1	9999.99	$123	
☐	R	139	A	100 E Test Listing RES	LHC	A.C. Dick Acres	4018	12	42	23	PID-123	$912	
☐	R	322	A	100 E EB Testing Linux Port	LHC	A.C. Dick Acres	4018	10	42	23	PID-123	$950	PHOTO NOT AVAILABLE

Multi-Photo/Gallery: Provides all of the photos for the listing. May also be found as part of the “Customer w/Gallery” display.

Customer Display: This display resembles the Full Display, but without the listing agent and listing firm information. It includes a section that provides the preparing agent's contact information, picture and logo.

Agent Display: This display shows contact information for the list agent. You will notice a link labeled "My Listings"; clicking on this link will show a list of the agent's active inventory.

Full Display: This display shows all available information on the listing; as well as information about the list agent. Links to other tools and information on the listing are at the top of the Full Display. **Each MLS System is customized; some links may not appear in your MLS System.**



The more commonly used icons are described below:

Map: Locates the listing on area maps.

Office Display: Provides contact information for the Listing Office.

Police: Creates an email message to be sent to the Board/Association Office regarding that listing.

Virtual Tour: Takes you to the Virtual Tour website for that listing, if available.

Agent Display: Provides contact information for the Listing Agent.

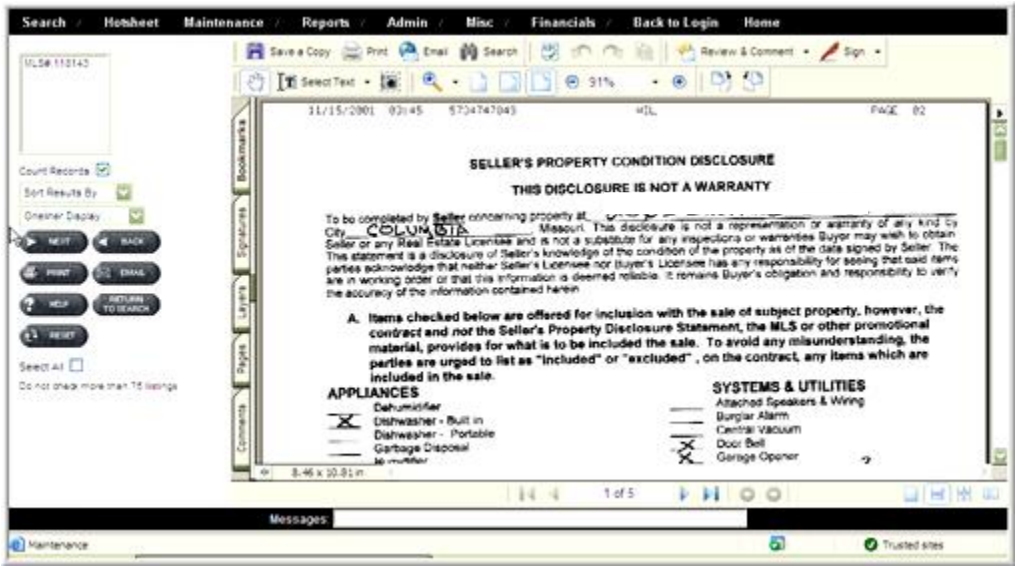
History: Displays a listing history report for that MLS number.

Photo Gallery: Allows you to view multiple photos for the listing on one page.

Attachments: To retrieve any documents provided by the listing agent, click on the “paper clip” icon.

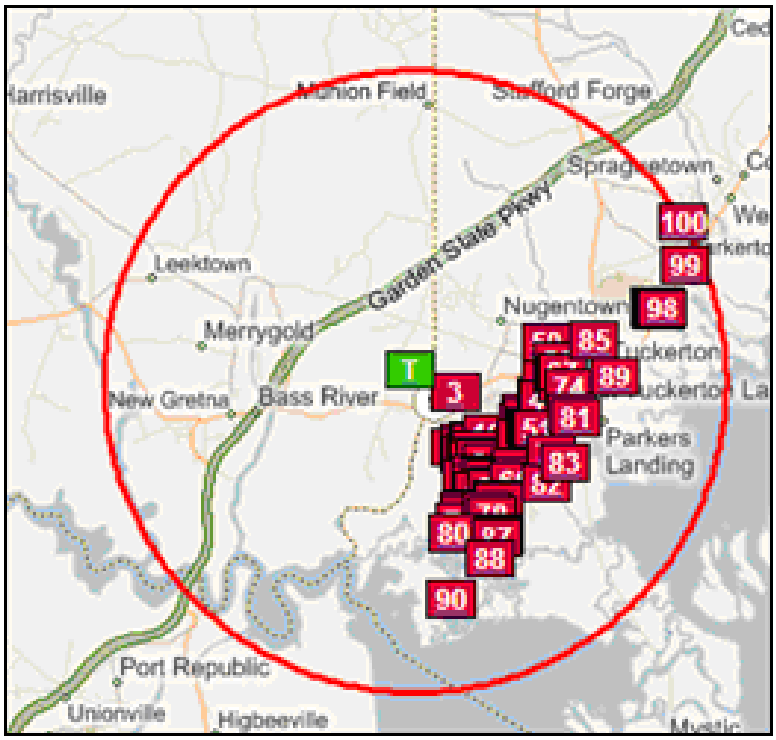
After you click the Attachments icon, a list of available documents will appear. Click on the title of the document you wish to retrieve.

Documents Available For This Property:
Seller Disclosure (1181431.pdf)
Lead Base Paint Disclosure (1181432.pdf)
Utilities (1181433.pdf)
Miscellaneous (1181435.pdf)
Use the BACK button on the control panel to return to InnoVia.



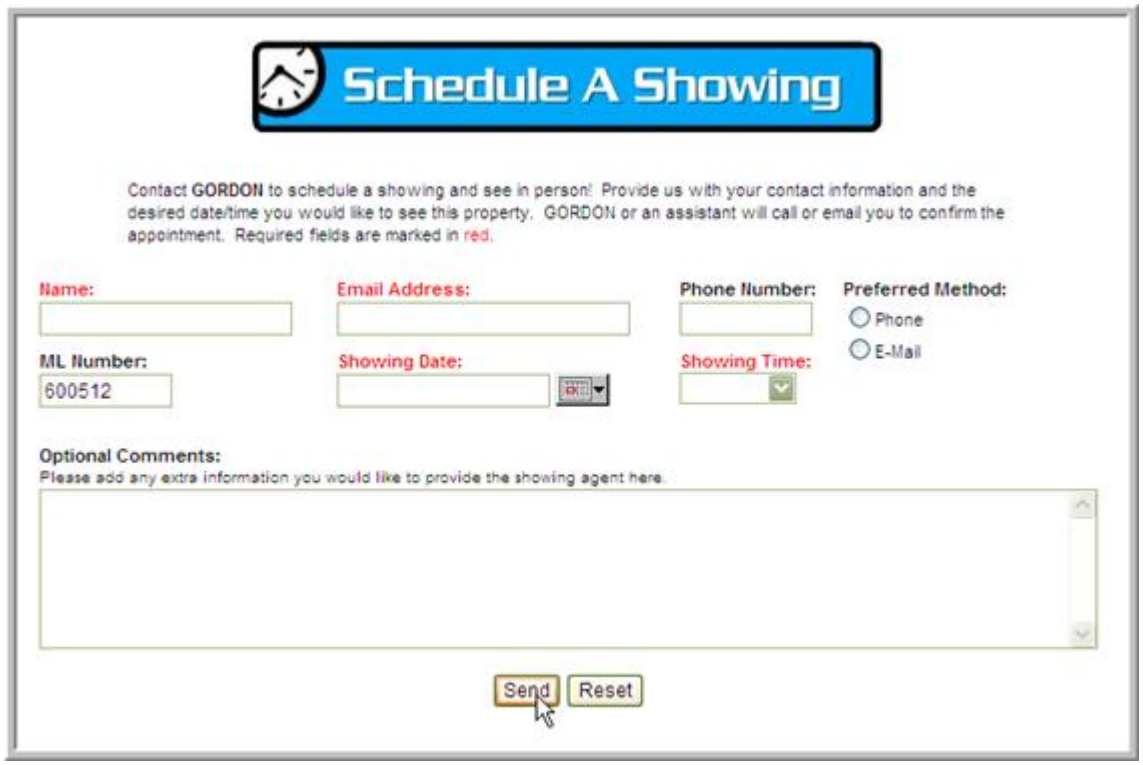
Map Comps: This tool allows you to map properties comparable to the listing you are viewing. Once you click this icon, you will be asked to provide the Sell Date range, Sell Price range, and a radius around the listing that you would like to search. Enter the criteria, click "OK", and a map of comparable properties will be presented.

After you click the Map Comps icon, provide the Sell Date range, Sell Price range, and a radius around the listing that you would like to search. Then click "OK".



Schedule a Showing: This button allows the user to email the Listing Agent, requesting a time to show the listing.

Enter the required details for the showing, and click "Submit". An email will be sent to the listing agent, who will then contact you about showing the listing.


Schedule A Showing
Contact GORDON to schedule a showing and see in person! Provide us with your contact information and the desired date/time you would like to see this property. GORDON or an assistant will call or email you to confirm the appointment. Required fields are marked in red.
Name:
Email Address:
Phone Number:
Preferred Method:
Phone
E-Mail
ML Number:
600512
Showing Date:
Showing Time:
Optional Comments:
Please add any extra information you would like to provide the showing agent here.
Send
Reset

E-Mailing Listings

You can email listings by selecting the Email option. Clicking the Email button prompts the system to email all listings currently displayed on the right side of the screen.

Once you are viewing the property or properties you would like to send to your client, and they are in the display you want to send, click on the "Email" button.

Once you click the "Email" button, the Email Display screen will appear.

This window has several features.

Prospects: This field displays your saved prospects that have an email address entered. To select one or more prospects, click on the desired names.

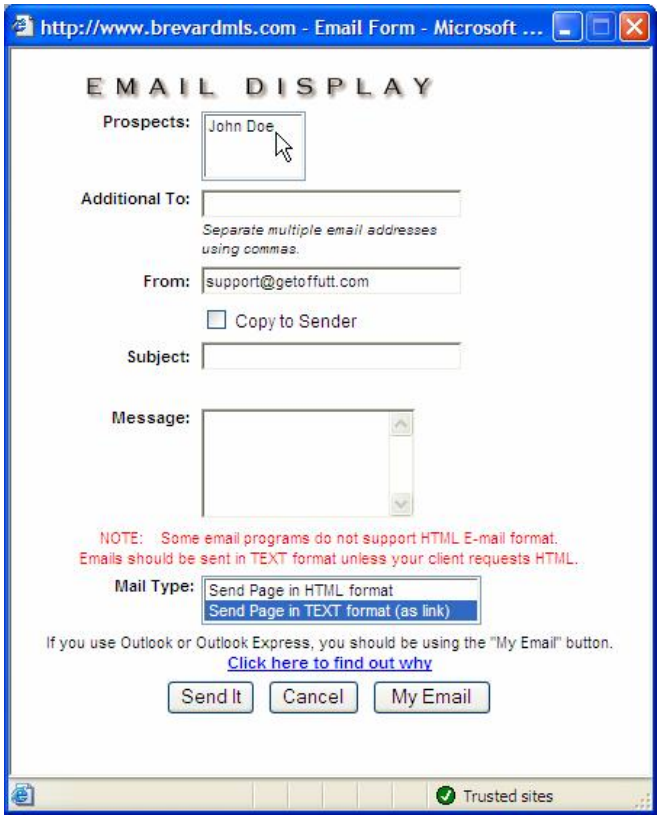
Additional To: This field allows you to enter email addresses that do not appear in your prospect list.

From: This field will auto-populate with your email address, provided you have one set up in your agent information.

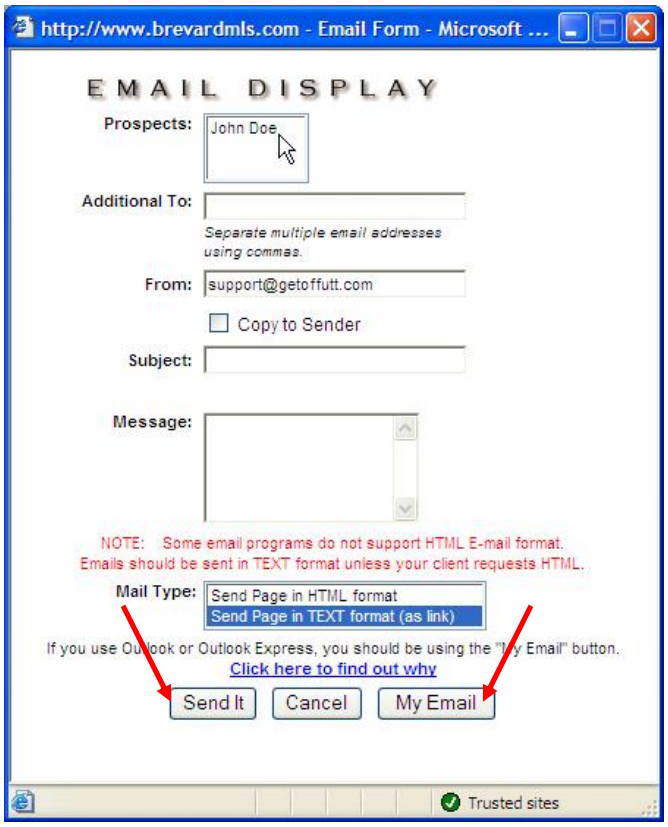
Subject: This field will be the Subject of the email sent to the recipient.

Message: This field is the text of the message that will be sent.

Mail Type: "Send Page in HTML format" will place the displays inside the body of the email. "Send Page in Text format (as link)" is the default (and recommended) choice. It provides a link to the displays, which will open in a web browser window.


http://www.brevardmls.com - Email Form - Microsoft ...
EMAIL DISPLAY
Prospects:
John Doe
Additional To:
Separate multiple email addresses using commas.
From:
support@getoffutt.com
Copy to Sender
Subject:
Message:
NOTE: Some email programs do not support HTML E-mail format.
Emails should be sent in TEXT format unless your client requests HTML.
Mail Type:
Send Page in HTML format
Send Page in TEXT format (as link)
If you use Outlook or Outlook Express, you should be using the "My Email" button.
Click here to find out why
Send It
Cancel
My Email
Trusted sites

Once you make your selections on the "Email Display" window, click "Send It" or "My Email".


http://www.brevardmls.com - Email Form - Microsoft ...
EMAIL DISPLAY
Prospects:
John Doe
Additional To:
Separate multiple email addresses using commas.
From:
support@getoffutt.com
Copy to Sender
Subject:
Message:
NOTE: Some email programs do not support HTML E-mail format.
Emails should be sent in TEXT format unless your client requests HTML.
Mail Type:
Send Page in HTML format
Send Page in TEXT format (as link)
If you use Outlook or Outlook Express, you should be using the "My Email" button.
Click here to find out why
Send It
Cancel
My Email
Trusted sites

Tips on emailing from InnoVia™:

1. When you select the "Send It" option, you are actually sending an email from the system's server, NOT from your PC. As a result, you will not have a record of the message being sent. We recommend that you send a copy to yourself for your records, by clicking the checkbox next to "Copy to Sender".

2. When you use the "My Email" function, InnoVia™ will launch the email software from your PC (i.e., Microsoft Outlook, Outlook Express, or Eudora). This will allow you to send the email from your email address, use your address book, etc.
   This function will ONLY work when you use email managing software on your computer, such as the examples mentioned above. If you use a browser-based email account (for example, AOL, Yahoo, or Hotmail), you will not be able to use the "My Email" function.

3. Only certain links will be "hot" when you email your listings. Links to the map of the property, virtual tours, and additional photos will be available to click on once emailed. Links to the Full Display, Listing History, and other information, which may be considered sensitive, will not be available.

Printing from InnoVia

You can print from any screen within InnoVia™ by clicking on either the “Print” button on your browser navigation bar, or the “Print” button on the left side of your screen.

There is also an option in the Matches Found pop-up box that allows you to print multiple displays at once. After you have initiated a search and the Matches Found Box is displayed, click on “Printer Friendly” button instead of the “Continue” button. The listings you selected will be loaded into one page and can all be printed by clicking on either the “Print” button on your browser navigation bar, or the “Print” button on the left side of your screen.

Once you are viewing the property or properties you would like to print, click on the “Print” button.

Utilizing the Use Checked Function:

The Use Checked function gives you the ability to perform a multitude of functions. It allows users to select listings from their search results and:

- Print selected listings
- E-mail selected listings
- Create a Power Point Slide Show Presentation
- Eliminate particular listings from search results
- Map selected properties
- Perform CMA's
- Put listings into a Prospect's Cart or My Listing Cart

To select specific listings from your results for an email, printout, map, etc, follow the instructions below:

Check the listings you would like to use.

From the Oneliner Display, select the listings that you wish to use by clicking in the Selection box next to the desired listings (located under SEL on the Oneliner Display). Checkboxes are also located in the upper right hand corner of the full-sized displays, if you prefer to use them.

Once you have selected your listings, click the "Use Checked" button.

After selecting the listings you want to use and clicking the “Use Checked” button, the “Selected Data” screen will be displayed.

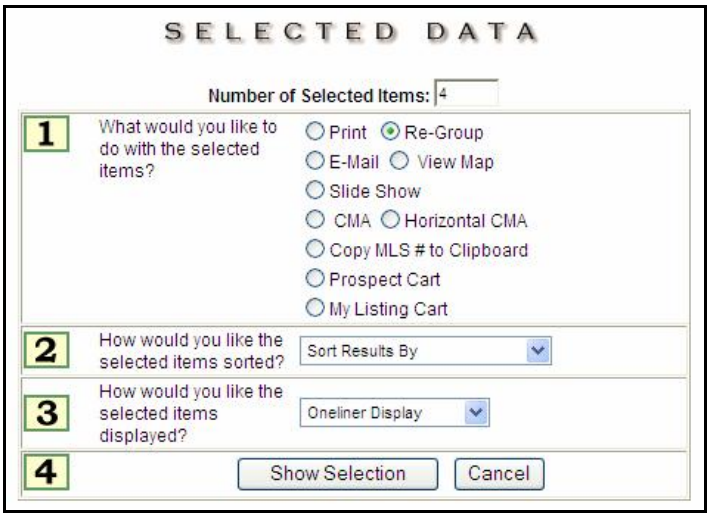
The number of selected listings is displayed at the top of the window.

Question 1: Choose what you would like to do with the selected listings.

Question 2: Choose how to sort the selected listings.

Question 3: Choose how to display the selected listings.

Question 4: Click “Show Selection” to continue.



Re-Group:

- To re-group the selected listings (eliminating the listings **not** checked), select the “Re-Group” option.

- Select how you would like your listings sorted and/or displayed by accessing the drop-down menus in steps 2 and 3 of the “Selected Data” pop-up box.

- Click on the “Show Selection” button and the system will re-group the checked listings, convert them to the selected display type, and sort them, according to the selected options. Once the items are displayed, you may print, email or further re-group the listings by un-checking any items you no longer wish to keep.

Print:

- To print the selected listings, select the “Print” option.

- Select how you would like your listings sorted and/or displayed by accessing the drop-down menus in steps 2 and 3 of the “Selected Data” pop-up box.

- Click on the “Show Selection” button and your listings will be printed according to the selected options.

E-Mail

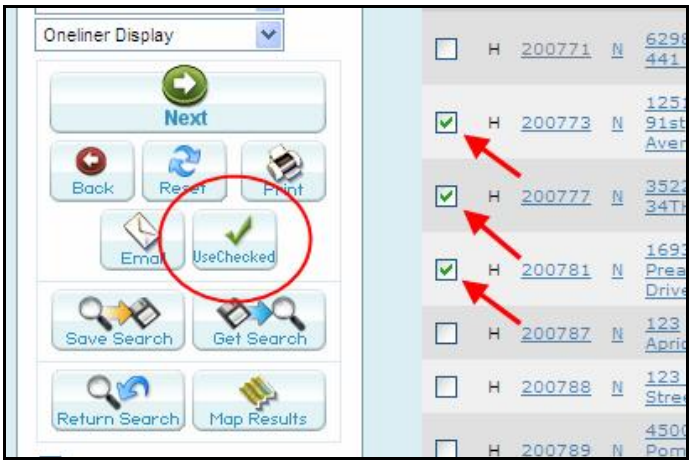
- Select the E-Mail option in the “Selected Data Screen”.
- Select how you would like your listings sorted and/or displayed by accessing the drop-down menus in steps 2 and 3 of the “Selected Data” pop-up box.
- Click on the “Show Selection” button and the Email Display window will appear.
- Fill in the appropriate information in the “Email Display” window and click either “Send it” or “My Email”.

Note: The “Additional To” field has a 100-character limit. This allows you to send an email to multiple recipients at one time, in the event the recipients are not in your prospect list.

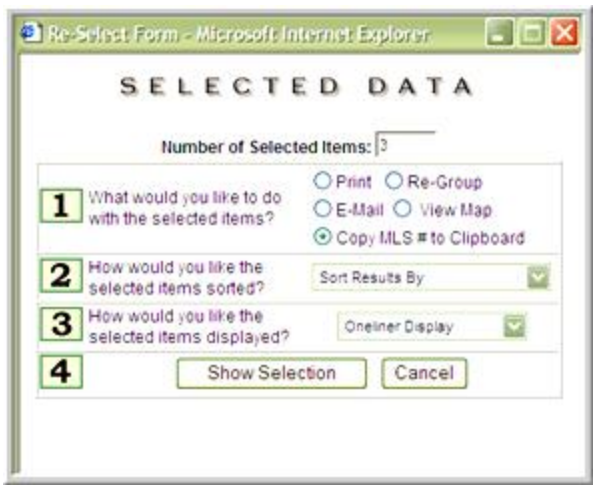
Copy MLS # to Clipboard

The “Use Checked” Function also allows you to copy the MLS # of the listings you selected to your clipboard. This makes it easy to access another function of InnoVia™, and “paste” the MLS # you want to pull up. For example; you may be conducting a Map-Based Search and want to take the listings that you have found and include them in your Comprehensive CMA. Once you have performed your Map-Based Search, just select the listings you want to copy the MLS # for, and click on “Use Checked”. When the “Used Checked” window appears, select “Copy MLS # to Clipboard” and click on “Show Selection”. At that point you can return to the Comprehensive CMA and “paste” the MLS # into the CMA as your comparable properties.

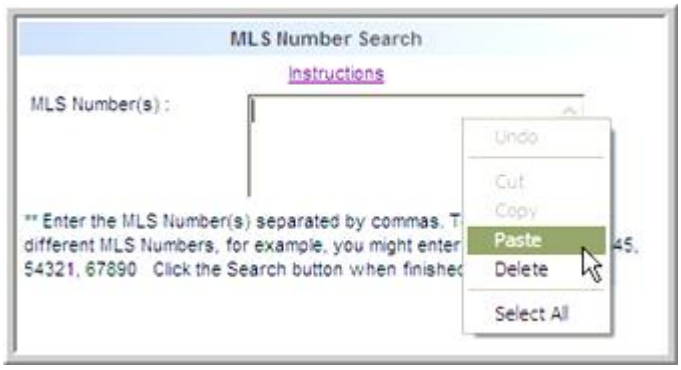
Check the listings you want to copy, then click on “Use Checked”.



Select "Copy MLS # to Clipboard" and click on "Show Selection".



Access the function in which you would like to use the MLS #, then paste them into the appropriate field.

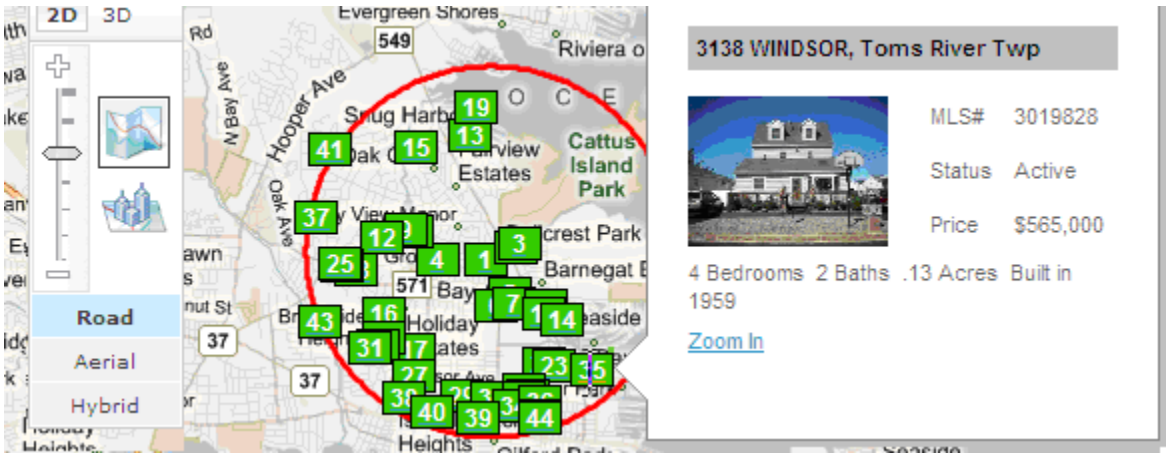


View Map

This function allows you to map up to seven properties at one time.

To utilize this function:

- Check the listings you would like to place on the map.
- Click "Use Checked".
- Select the "View Map" option on the Selected Data Screen window.
- Click on "Show Selection".
- An area map will be displayed (as shown below), along with a one-liner display for each listing.



Select	Item	PT	ST	MLS	Photo	Address	Municipality	SqFt	SellS	SellDt	DOM	Sell/ List	Photos	Dist (Mi)
☐	1	R	A	3019886		1130 Audubon Dr	Toms River Twp	1,142			12		1	0.17

NOTE: You can email the results by clicking on the “Email” button out to the left of the map. Once you click ‘‘Email’’, you will be taken to the Email Display window to select the clients to which you wish to email the map. You may also use the "My Email" option in the Email Display window to email the map to your clients.

If you access the map for a property and you get no results, it could be due to a couple of different problems.

1) If it is a new area, Virtual Earth may not have it added to their database.

2) If the address for the property has been entered in the system incorrectly by the list agent, it may not match Virtual Earth’s database and, as a result, will not give you a map of the property.

Driving Directions

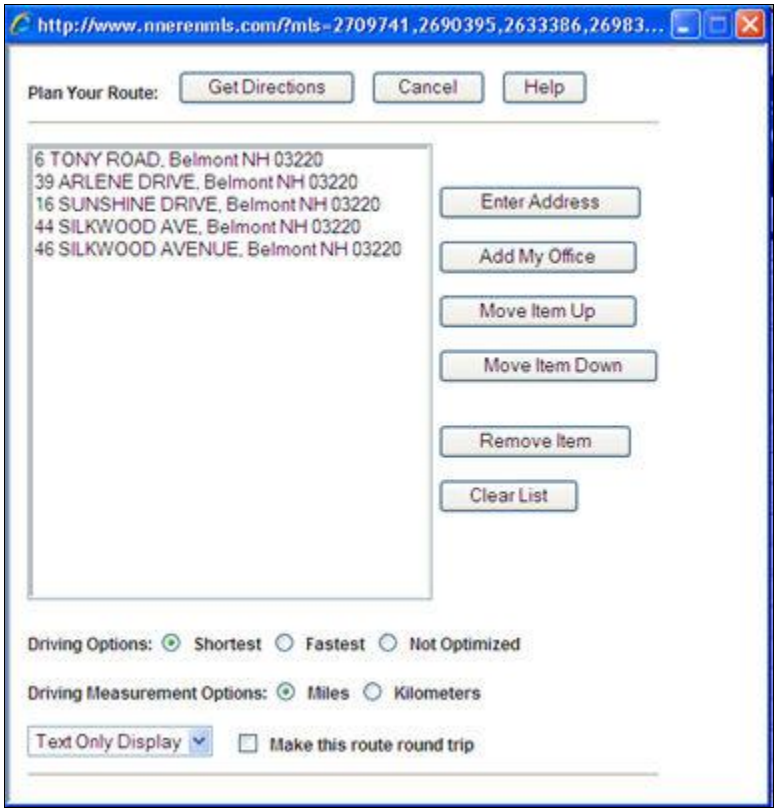
Much like several popular mapping websites, InnoVia has a built-in Driving Directions tool, allowing you to quickly map out turn-by-turn directions from one listing to another, or an entire route of up to 20 listings. You can also include your office address or any manually entered address as stops on your route.

Using Driving Directions

The Driving Directions option is located in the **Use Checked** window, from any of InnoVia's searches including Property Type searches, Cross Property Type, MLS Number, Hotsheet, Inventory Reports, My Hotsheet, and My/Office/Firm Inventory sections.

- Once the listings have loaded on the screen, check off those for which you would like driving directions.
- Click **Use Checked** on the left.

- From the Selected Data screen, choose **Driving Directions** and click **Show Selection**.
- This will open the "Plan Your Route" window.



- To enter a new starting point or another stop in the route click **Enter Address** or **Add My Office**
  Enter Address - manually enter an address and click "Add Address to List"
  Add My Office - automatically adds your office address to the list

- To rearrange the stops in the route, highlight an address and click either **Move Item Up** or **Move Item Down. It is up to you to determine the best order of the stops in your route.**

- **Remove Item** allows for the removal of one address at a time, **Clear List** will clear the entire address list.

- Next to Driving Options you can choose the **Shortest** or **Fastest** route, or neither with **Not Optimized**. ***Note****: This setting affects the directions between any 2 stops in your route,* ***NOT the overall order of stops on the route****. YOU determine the order by moving the addresses up or down in the list.*

- Choose **Miles** or **Kilometers** for the Measurement Options.

- From the drop-down menu in the lower left, choose a display option:
  Text Only - Displays only text for Distance, Time, and turn-by-turn directions for each leg
  Text w/Pin Maps - Displays a map of the route and turn-by-turn directions with individual maps for each leg
  Text w/Overlay - Displays a map of the route and turn-by-turn directions for each leg

- If applicable, choose ***Make this route round-trip*** to bring you back to your starting point

- You may also ***Choose route based on traffic.*** If available in your area, you can then right click on the resulting map and choose to Show Traffic, which will show you color coded roads and streets based on the current traffic conditions.

- When ready, click **Get Directions** at the top

- To email or print your driving directions, simply use the **Email** or **Print** button on the left.

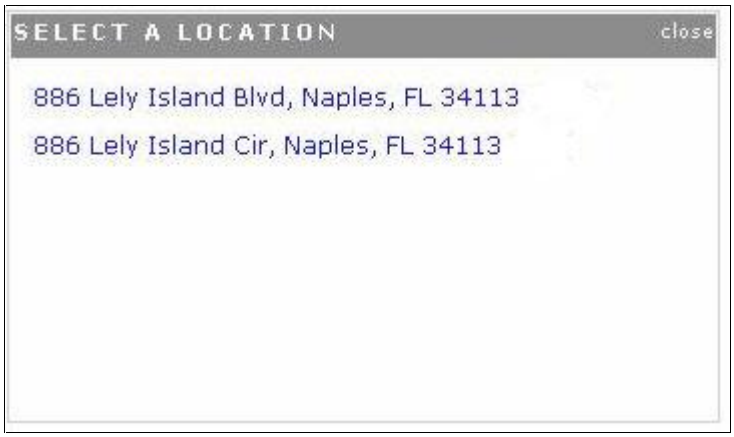
- You can change your display option after the directions have loaded by selecting a new one from *Map Display Options* on the left.

- You can also make changes to your route by clicking Edit Route on the left.

It is possible that one or more of the locations you have selected cannot be found on the map, depending on Microsoft Virtual Earth's database. If this is the case, you will be prompted with a message to notify you. Selecting "OK" from this message will let you continue with your directions, but will leave off the address that is not found. Selecting "Cancel" will take you back to your search results.

Windows Internet Explorer
The address 300 GOODLAND, Goodland FL 34140 could not be located.
If you would like to continue without including this address please press Ok.
Else pressing Cancel will return you to your search results
OK
Cancel

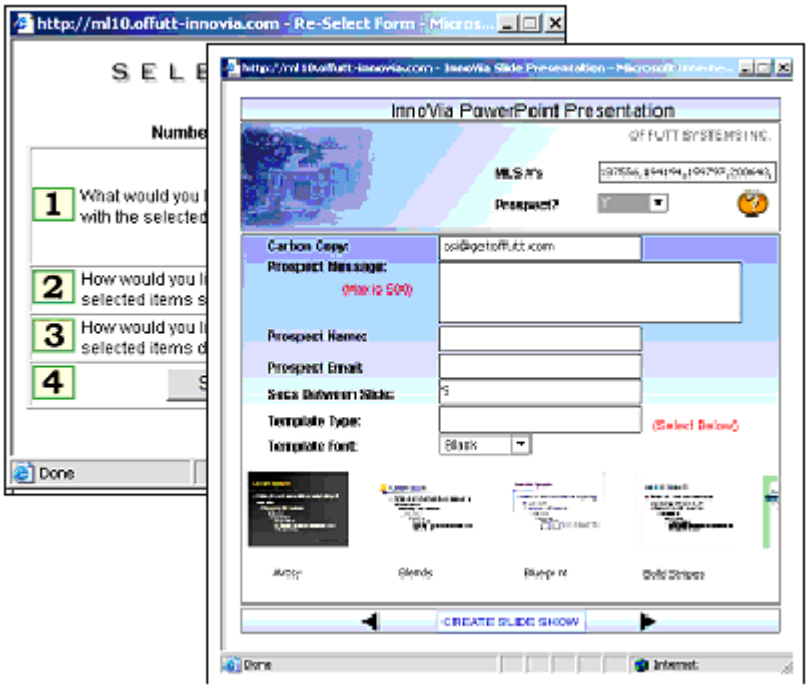
It is also possible to receive a message from Virtual Earth to choose an address that best matches the one that you chose. An example could be two street addresses that are the same except for the street modifier, as seen below.



Slide Show

To create a Power Point Slide Show with selected listings:

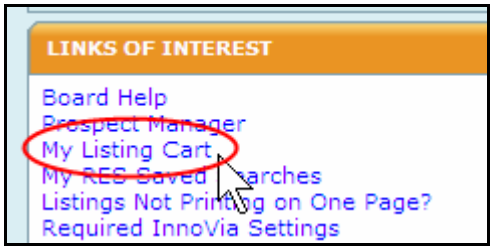
- From a list of search results, place a check in the boxes beside the listings you would like to use in a Slide Show.
- Click "Use Checked"
- In the "Selected Data" screen, choose "Slide Show"
- The Slide Show dialogue window will open.
- If you would like to send the slide show to a customer, select "Yes" beside "Prospect?"
- Input the name and email address of your customer
- Choose the font color and slide style
- Click "Create Slide Show"
- The slide show will be emailed to you and/or your customer within a few minutes
- If you or your customer do not have Microsoft Power Point, the reader can be downloaded by using the link provided in the email



My Listing Cart

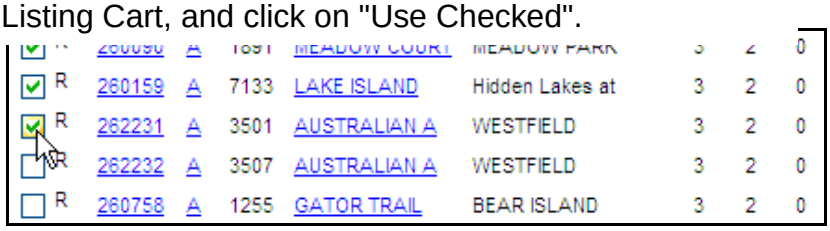
Depending on your MLS, you may have the My Listing Cart feature available. My Listing Cart allows you to temporarily store search results from multiple searches into a central location. You can then email or print these listings in multiple displays at the same time, even if they are different property types.

My Listing Cart is located under the "Links of Interest" section on the My InnoVia home page.



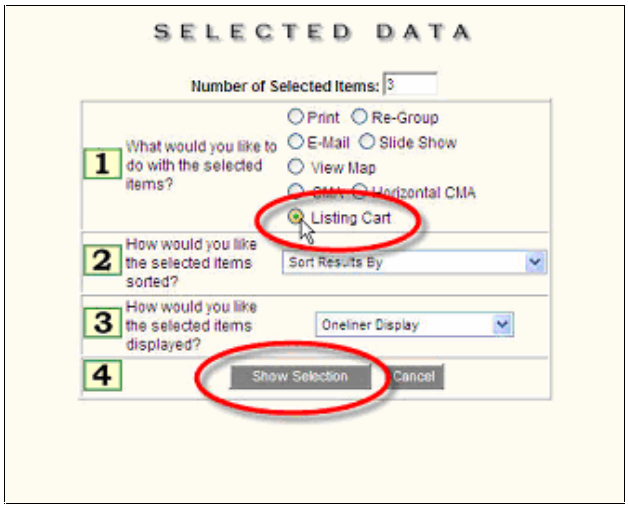
Adding Listings to the Listing Cart

Listings are added to My Listing Cart through the "Use Checked" button. Once you have done a search, check off the listings you would like to include in the Listing Cart, and click on "Use Checked".


R 260159 A 7133 LAKE ISLAND Hidden Lakes at 3 2 0
R 262231 A 3501 AUSTRALIAN A WESTFIELD 3 2 0
R 262232 A 3507 AUSTRALIAN A WESTFIELD 3 2 0
R 260758 A 1255 GATOR TRAIL BEAR ISLAND 3 2 0

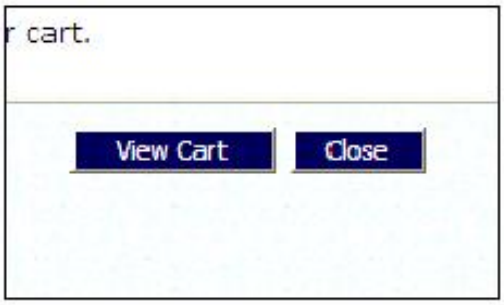
From the Selected Data screen, choose the "Listing Cart" option. Click "Show Selection".

The next window will show you how many listings are currently in your Listing Cart. You can click the "View Cart" button to access the listings in your cart for emailing or printing, or click the "Close" button to go back to the your current search results



My Listing Cart

You can access your Listing Cart two ways. First, by clicking the "View Cart" button after adding listings to the cart through the "Use Checked" button. Second, by going to the "Links of Interest" section from the home page.



From the Listing Cart:

1. Check off the listings that you would like to work with.
2. Choose what display you would like to Preview, Email, or Print from the display list. You are allowed to select more than one display, simply hold the CTRL key on your keyboard when selecting them.
3. On the left side of the page, there are buttons to Preview, Delete, E-Mail, or Print the listings.
4. Click the appropriate button.

In the upper left corner of the page, there is a "Select All" option to check every listing, as well as a drop-down list to sort the listings in the cart. You can also sort by any field with the white arrows at the top.

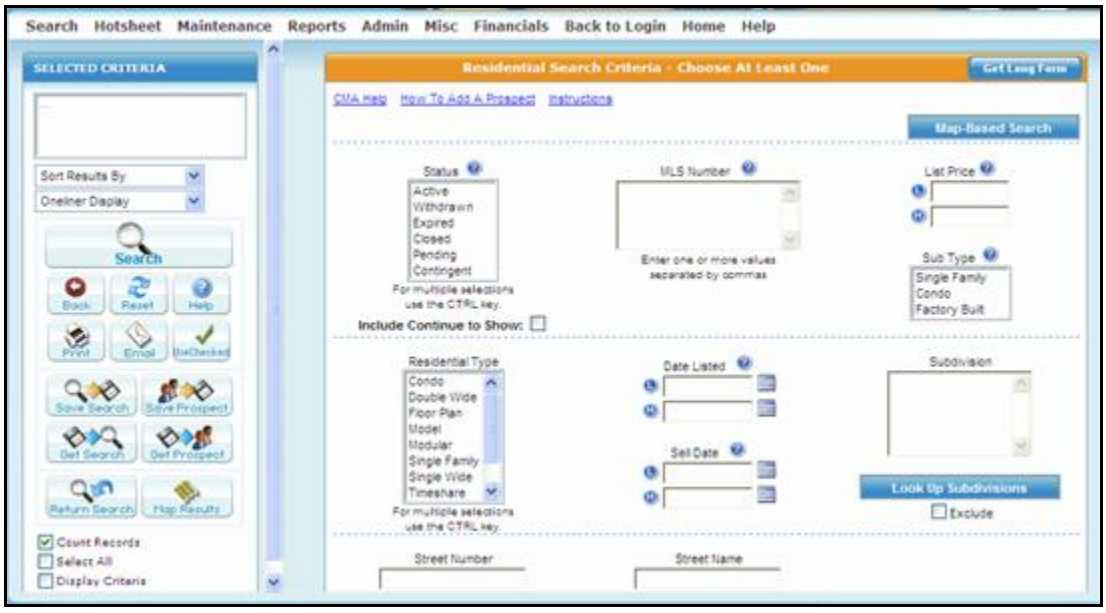
If previewing listings, you can email or print those listings by simply clicking the "Email" or "Print" button.

Performing a CMA

To begin a CMA, click "Search" on the navigation bar, then choose "Residential" (or the applicable property type)

Perform a search for **comparable** properties. It may be wise to enter search criteria that is applicable to your **subject** property, so that the resulting listings will truly be comparable to your subject property. The more detailed your search, the more accurate your CMA will be.

If your subject property has 3 bedrooms and 2 bathrooms, a 2 car garage, and is in a particular subdivision, you will want to do a search for properties that are as similar as possible, so enter those items into the search screen.



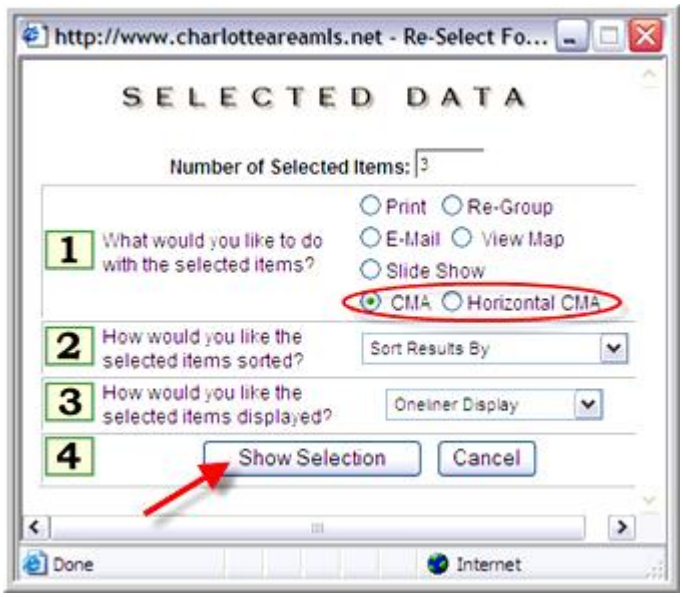
At the Oneliner Display screen, select the most comparable properties available by clicking in the selection box to the left of the ML # column.

NOTE: For the columnar CMA, up to three comparables may be used. If you would like to use more than three comparables, make your selections and use the "Horizontal CMA".

Once you have made your selections, click the USE CHECKED button to move to the next step in the CMA process.

When the "Selected Data" screen is displayed, click the "CMA" selection for three or fewer comparables, or the "Horizontal CMA" for more than three comparables.

Click the "Show Selection" button to move to the next screen.

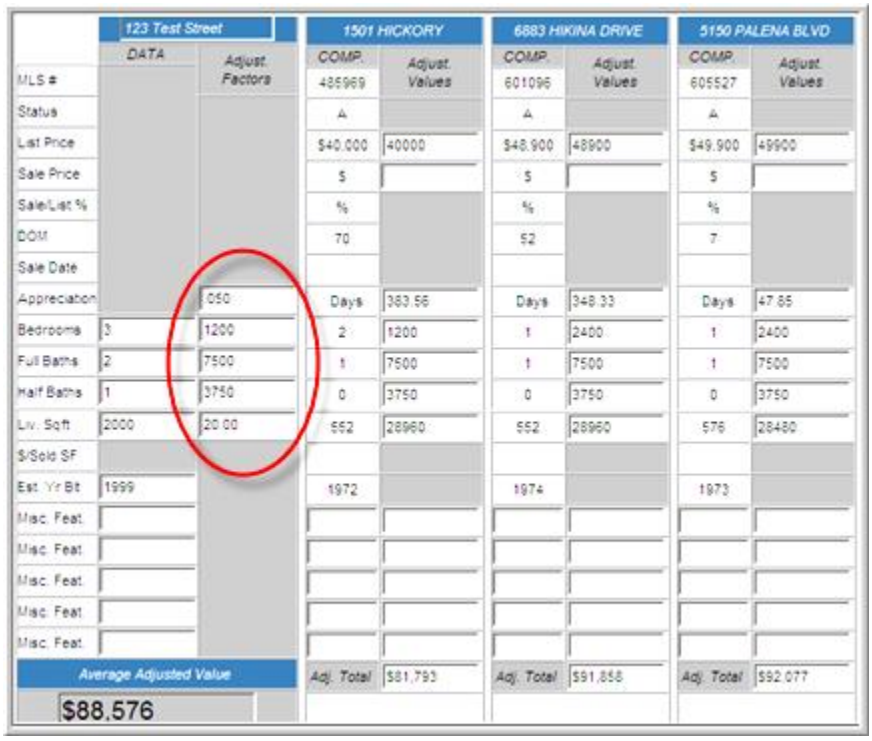


At the "Subject Property Info" screen display, enter the requested information as it relates to your subject property.

Having entered your information, click the "Submit" button to view your CMA.

The CMA will be displayed in a vertical column format. The adjustment factors and values may be edited manually on this screen, allowing you to customize your CMA.

After you enter a new value in a field, simply hit the TAB key on your keyboard or click on another field to recalculate the Total Adjusted value.



	123 Test Street		1501 HICKORY		6883 HIKINA DRIVE		5150 PALENA BLVD	
	DATA	Adjust. Factors	COMP.	Adjust. Values	COMP.	Adjust. Values	COMP.	Adjust. Values
MLS #			485969		601096		605527	
Status			A		A		A	
List Price			$40,000	40000	$48,900	48900	$49,900	49900
Sale Price			$		$		$	
Sale/List %			%		%		%	
DOM			70		52		7	
Sale Date								
Appreciation		050	Days	383.56	Days	348.33	Days	47.85
Bedrooms	3	1200	2	1200	1	2400	1	2400
Full Baths	2	7500	1	7500	1	7500	1	7500
Half Baths	1	3750	0	3750	0	3750	0	3750
Liv. Sqft	2000	20.00	552	28960	552	28960	576	28480
$/Sold SF								
Est. Yr Blt	1999		1972		1974		1973	
Misc. Feat.								
Misc. Feat.								
Misc. Feat.								
Misc. Feat.								
Misc. Feat.								
Average Adjusted Value			Adj. Total	$81,793	Adj. Total	$91,858	Adj. Total	$92,077
$88,576								

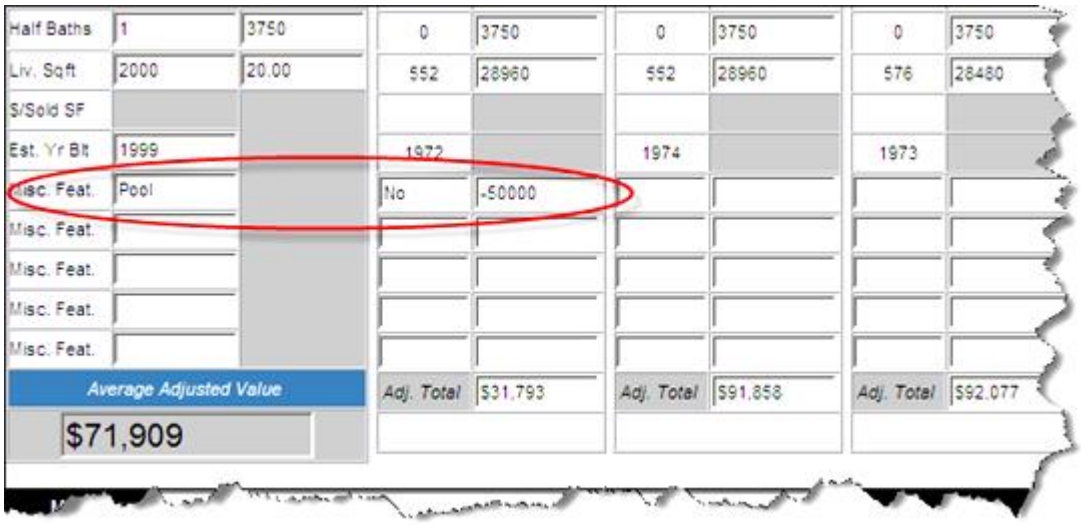
"Misc. Feat." fields are also available to allow you to further customize your CMA. To adjust for the fact that your subject property has a pool, for instance, whereas your comparables do not:

- Type the word "Pool" in the Subject Property column, in the "Misc" row.
- For the comparables, in the corresponding field (COMP column), type "no"
- In the very next field (Adjust Factor column), type in a value for the pool. This will adjust the value accordingly to reflect the fact that the subject property has a pool, and the comparable property does not.

- Repeat for any other comparables, entering a description for the item in the “COMP.” column and a value in the “Adjust Values” column.

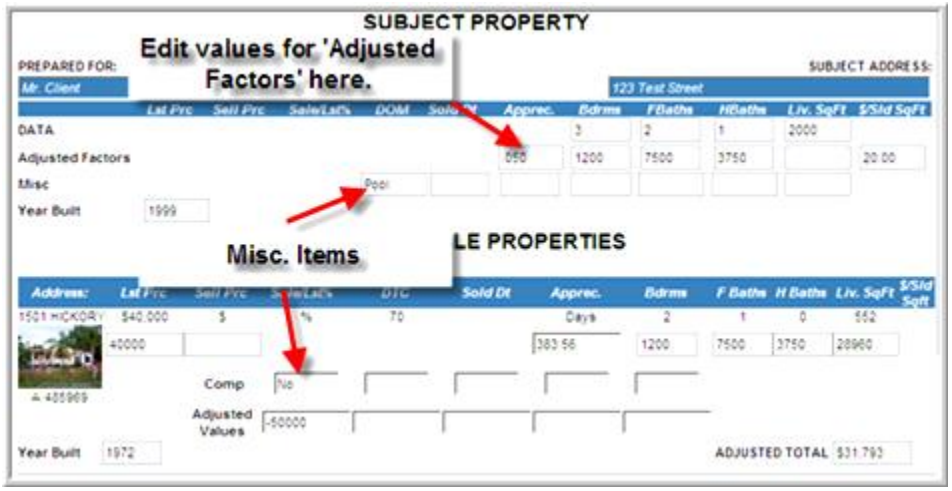
- Negative values are also allowed in the miscellaneous fields to adjust for features a comparison property has that the subject property does not.

- The CMA can be emailed by clicking on the email display button and/or printed by clicking the print button on the browser navigation bar.



Horizontal CMA

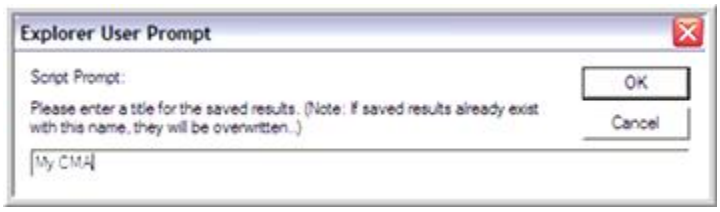
For the **Horizontal CMA**, all instructions are the same except that miscellaneous descriptions should be entered into the smaller “Misc” field, and the value in the larger field beside it (see figure below).



Saving your CMAs

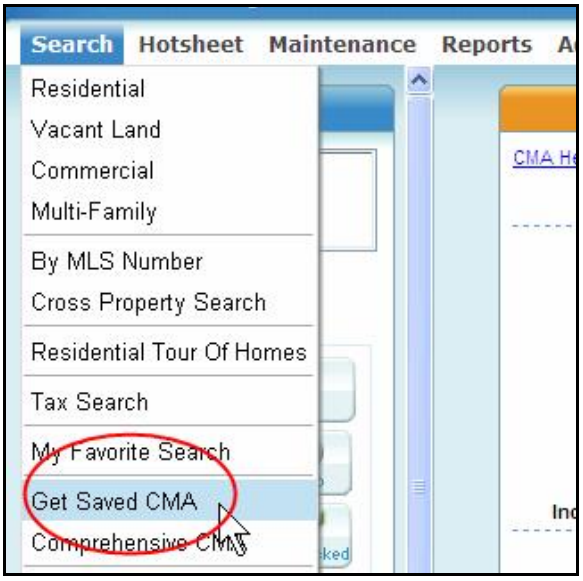
Once you have completed your CMA, click "Save Search".

At this screen, type in the title you wish to assign to your CMA, then click "OK".

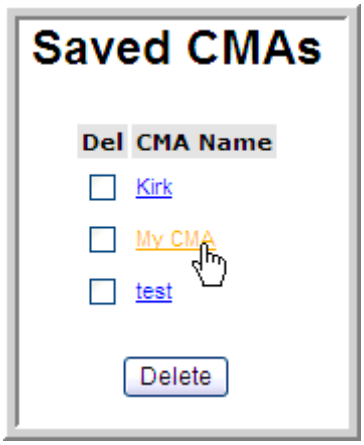

Explorer User Prompt
Script Prompt:
Please enter a title for the saved results. (Note: If saved results already exist with this name, they will be overwritten..)
OK
Cancel
My CMA

To retrieve a saved CMA, you will need to do the following:

Access the InnoVia Navigation Bar, and Select the "Search" drop down tab, then click on "Get Saved CMA" or "Get Saved Display Results".

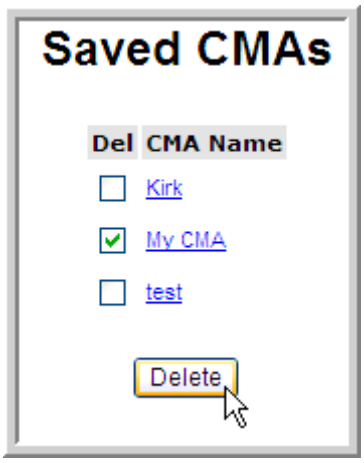


You will then be presented with a list of your Saved CMAs.



To view a particular saved CMA, click on the link(s) provided.

To delete a saved CMA, check the one you would like to remove and click the Delete button.



To modify an existing CMA, make the changes desired, then use the “Resave” button at the top of the page. You will be prompted to name the CMA. To retain the former CMA, and save the changes as a new CMA, change the name slightly. If you do not wish to retain the old CMA, leave the name as it is, and InnoVia will apply the changes to the old CMA.

CMA Displays (PDF)

Depending on your MLS, you may have several display options that you can use to run a CMA, and save the results as a PDF document. Examples are:

CMA Summary (pdf) - CMA 3-Up (pdf) - CMA Flyer (pdf) - CMA Chart (pdf)

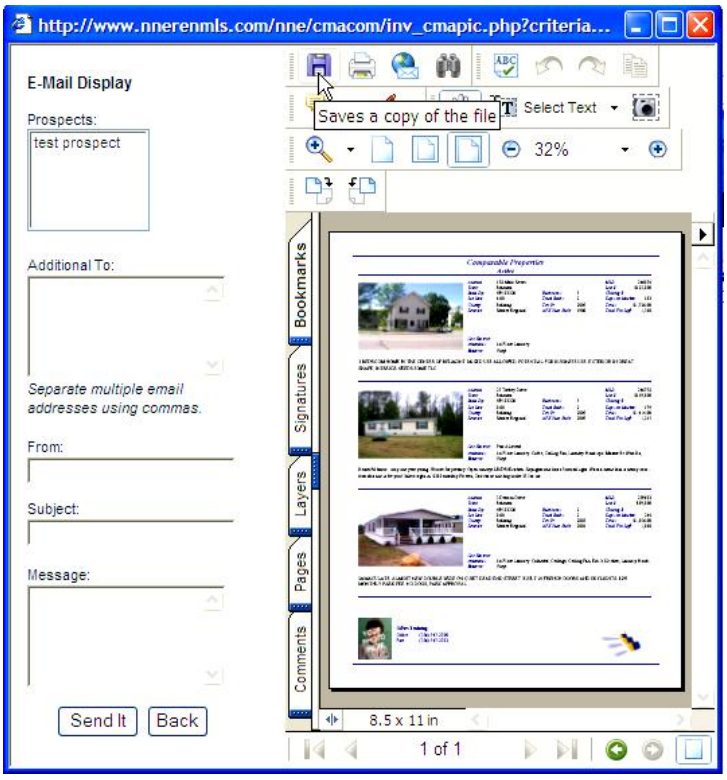
Using these CMA options is as easy as changing display types from your search results. They are located in the same drop down as the other displays on the property type search screens.

- Choose one of the CMA displays from the display list, before or after you bring up your search results, and all of the listings will be included

OR

- Check off exactly the listings you want to include, click “Use Checked”, select the “Regroup” option, and then choose one of the CMA displays from the drop down list. When you click “Show Selection”, only those listings you checked off will be included in the display.

The listings will come up in a separate window as a PDF in the display you chose. This can be emailed using the fields on the left, or saved to your computer by clicking the “Save a Copy” button at the top.



Utilizing Download Functions

InnoVia™ offers the ability to download data to be used in other programs.

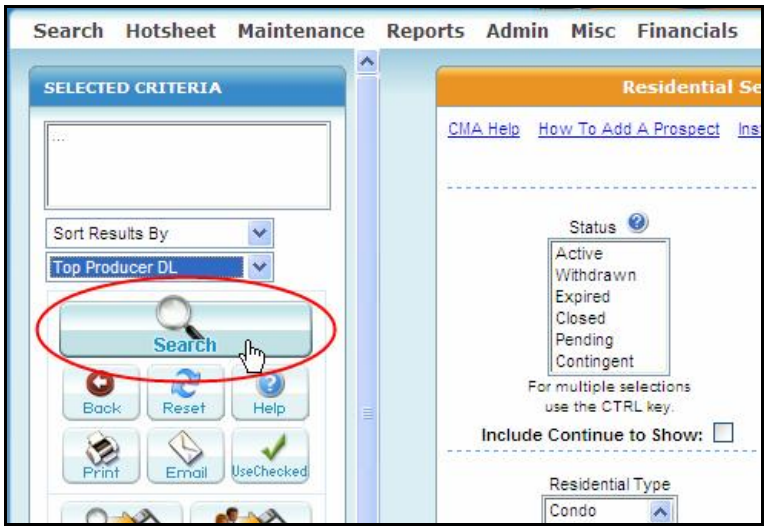
To utilize these download features, follow the instructions listed below.

Top Producer:

Perform a search for the properties you would like to download for use in the Top Producer program.

Note: InnoVia also offers Generic ASCII downloads that can be used in a variety of other programs. To download the data using the Generic ASCII download, follow these instructions with the exception of choosing the Generic ASCII download from the Choose Display Type drop down.

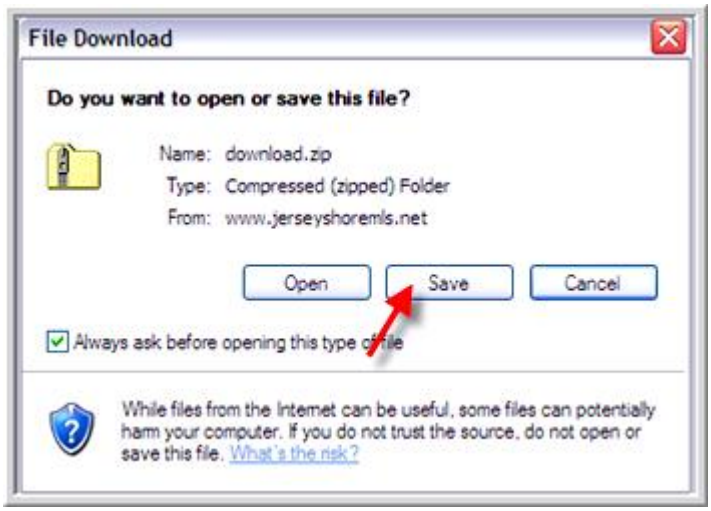
BEFORE clicking the "Search" button, choose the "Top Producer Download" from the "Choose Display Type" drop down menu. Click on "Search".



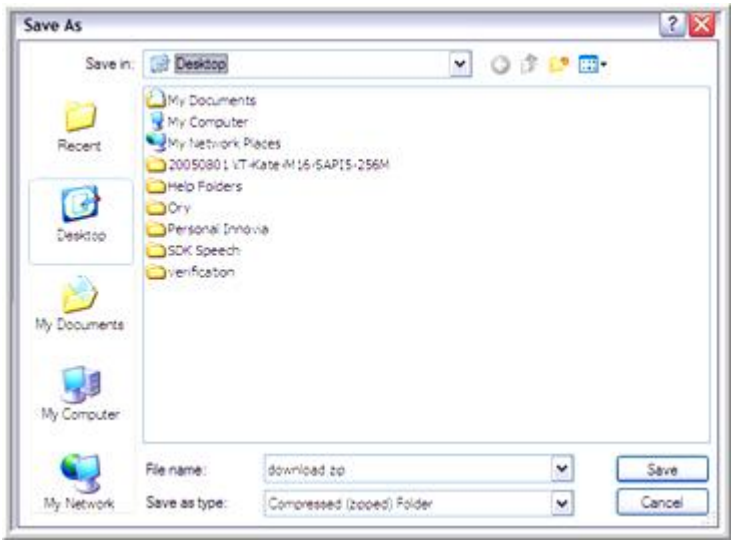
When the “Matches Found” box appears, click on “Continue”.

A File Download screen will appear (shown below).

Click “Save”.


File Download
Do you want to open or save this file?
Name: download.zip
Type: Compressed (zipped) Folder
From: www.jerseyshoremls.net
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Now choose a location in which to save the file on your PC.



The data will be saved as a zip file in the designated folder.

Downloading to a Spreadsheet

You may also have a “Spreadsheet View” or “Spreadsheet Download” as well as an “MS Friendly Download” available in the list of displays, depending on your MLS system. The MS Friendly DL will save to a file that you can then import into a program such a Microsoft Excel. The Spreadsheet DL will allow you to export listing data directly from InnoVia into an open Excel Spreadsheet.

To use either of these options, simply select it from the list of displays once you have the data on your screen that you would like to export.

Note: when using the Spreadsheet DL, the spreadsheet may open in the same browser window, if you would like it to open in a separate Excel window, follow these steps:

- Double-click “My Computer” from your desktop, and from the window that opens, click on the “Tools” menu, then “Folder Options”
- Click on the “File Types” tab, and scroll down until you see “XLS Microsoft Excel Worksheet”, click once on it to highlight
- Click the “Advanced” button at the bottom, and UNCHECK the box next to “Browse in same Window”
- Click “OK” and “Close”

From this point forward, when using the Spreadsheet DL, it will open in a new Excel window.

Downloads Not Working?

In order for these downloads to work you may need to add the web address of your MLS system to the “Trusted Sites” list in Internet Explorer. Follow these steps:

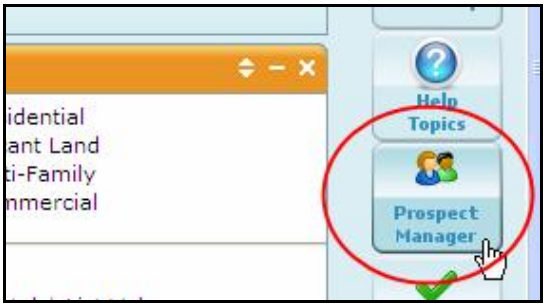
- While Internet Explorer is open, click on the “Tools” menu, and then “Internet Options”
- Click on the “Security” tab, click once on the green “Trusted Sites” icon, and click the “Sites” button below the icon
- In the section “Add this Web site…”, type in the web address of your MLS system (www.mlsaddress.com)
- Click the “Add” button (if you receive an error you will need to uncheck the box next to “Require server verification…” and click Add again)
- Click OK

Prospect Manager/ Prospect Listing Cart

The "Prospect Manager" is a tool that you can use to set up and maintain your prospects. You will be able to set your prospects up for a "Listing Cart", which gives them the ability to access a web page showing them all the listings that are in their cart. The system will automatically place new listings, listings that come back on the market, listings with changes, or listings of any other status meeting their criteria, into their Listing Cart.

Prospect Manager

Click on the "Prospect Manager" button on the right side of the My InnoVia home page, or under the MISC menu.

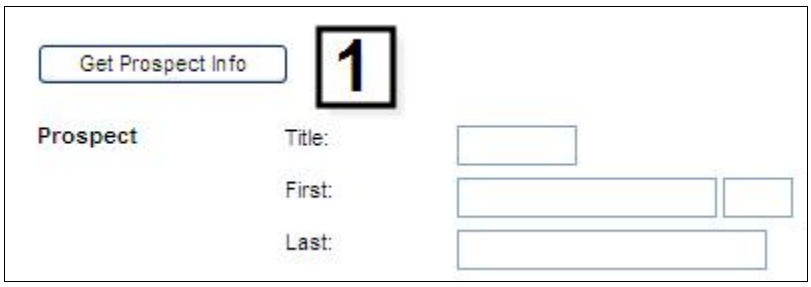


Adding a New Prospect

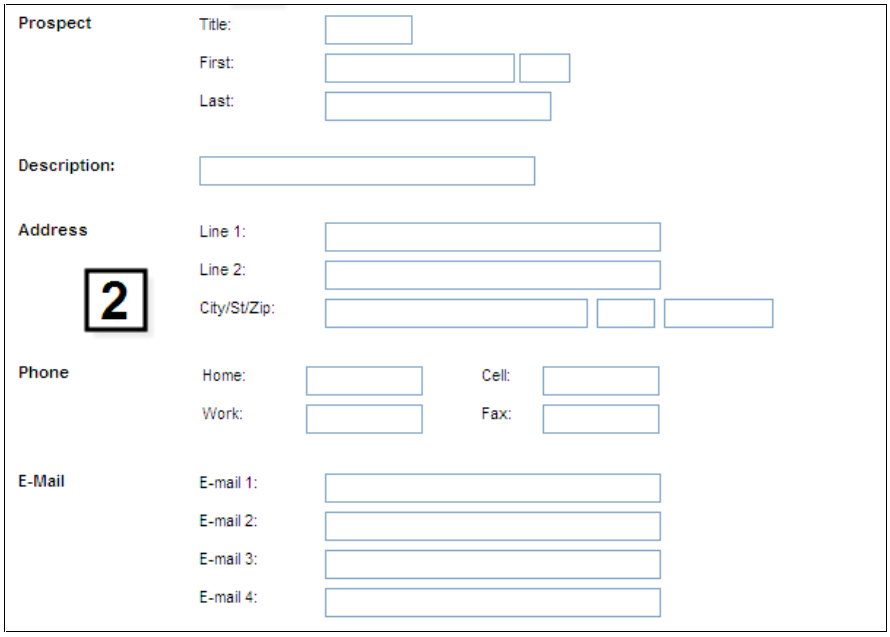
To add a new prospect to the prospect manager, click on "Add New Prospect" in the lower left corner of the Prospect Manager

This will bring up a window where you will enter the prospect's contact information.

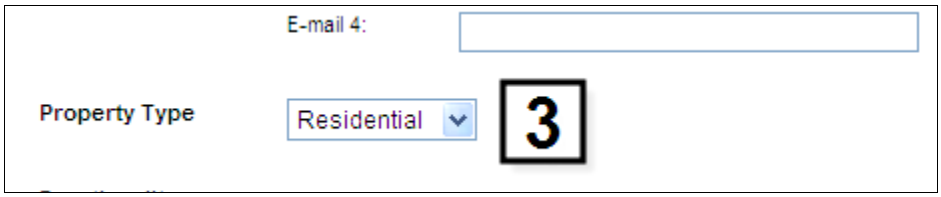
1. The "Get Prospect Info" button will take you to a web site where you can select a prospect from your previous MLS system, and the prospect's contact information will auto-populate onto the new prospect screen (if available).



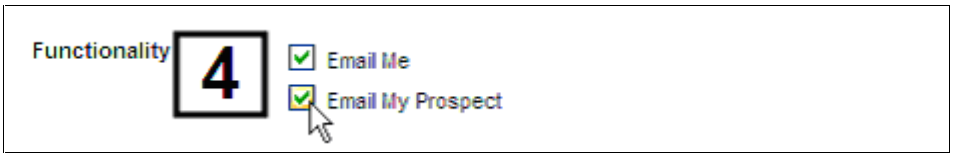
2. Enter the Prospect's contact information. The First and Last name is **mandatory**. A description will auto-populate based on the name, but you can change it if necessary. Enter up to 4 email addresses to receive the automatic emails



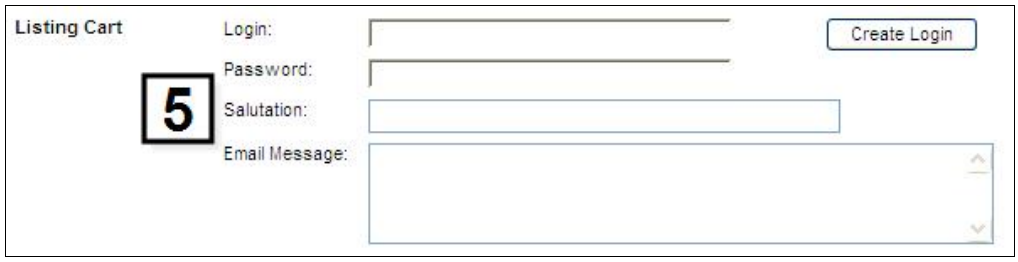
3. Select the property type for the prospect. A prospect can only be saved under one property type at a time.



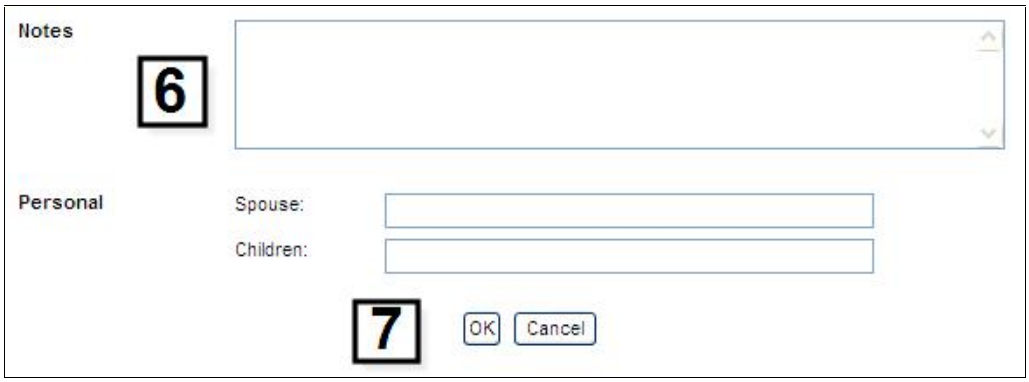
4. Select where you want the email notifications to go. Selecting "Email Me" will send you, the agent, an email when a match is found for your prospect. If you want the Prospect to get the automatic email, select "Email My Prospect". If you select both, it will Carbon Copy you on the email that the Prospect gets from InnoVia..



5. To set up your prospect with an ID and password for their listing cart, click on the Create Login button. This will automatically assign your prospect an ID and password for their cart. If you do not create the login, it will be automatically created as soon as you save the prospect, as long as your prospect has a first and last name. Each time a listing is found for your prospect, they will receive an email from InnoVia with a link to their cart, that will log them directly into the cart. They will NOT have to enter this ID and Password. It simply gives them the ability to access their cart from a computer other than their own. The automatic email they receive will also have a link to a web page where they can log in, if necessary. You can also enter a Salutation and a Message to be included in each of the auto emails. The Salutation will default to "Dear (First Name)(Last Name)", but you can change it if necessary. **NOTE**: If your MLS is converting from the old way of prospecting, you may already have a salutation included in the Email Message section. You may want to move this salutation into the Salutation field, so as not to have 2 salutations in the auto emails.

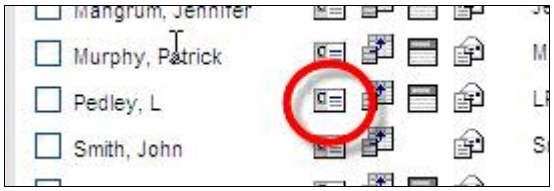


6. Enter any additional Notes (only to be seen by the agent on this screen)
7. Click "OK" when you're finished to save the prospect



Editing a Prospect's Contact Information

From the Prospect Manager, click on the "Edit Prospect" button next to the prospect's name.



This will bring up the prospect's contact information. Change anything that needs to be changed, and click "OK" at the bottom of the screen.

If your MLS is converting from the old way of prospecting to Prospect Manager, you may notice several of your prospects will have a **red** "Edit Prospect" button, with an exclamation point. This is flagging those prospects that do not have a **First** and **Last** name. These prospects will also be at the top of the list. Remember, prospects need a first and last name in order to get a login ID and password to the cart. The auto emails will not be sent to prospects that do not have ID's and passwords to their cart, so it is very important that you give these prospects a name, to ensure continued delivery of the auto emails.

Setting Up/Editing a Prospect's Criteria

Once the prospect has been added, to input or edit their search criteria, click on the "Edit Search Criteria" button next to the prospect's name.

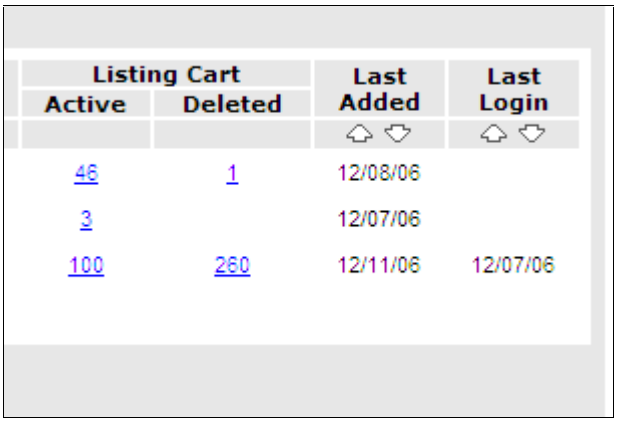
This will take you to the search screen for that property type, where you will enter the search criteria for the prospect. Once the search criteria has been entered, click on the "Save Prospect" button on the left side of the screen, and when the save prospect window opens, click "OK" at the bottom. **Remember:** You CAN use the Map Based Search option as part of your prospects' criteria. Refer to the Map Based Search instructions for help.

Running a Manual Search

Also located next to the prospect's name is a "Search for Matches" button. Clicking on this button will search the MLS system for any listings that match the prospect's criteria, that have not already been added to their listing cart. It will then give you the option to email those listings, add those listings to the prospect's cart, or print those listings in a number of different displays. This can be used as your initial method of populating their cart with existing listings.

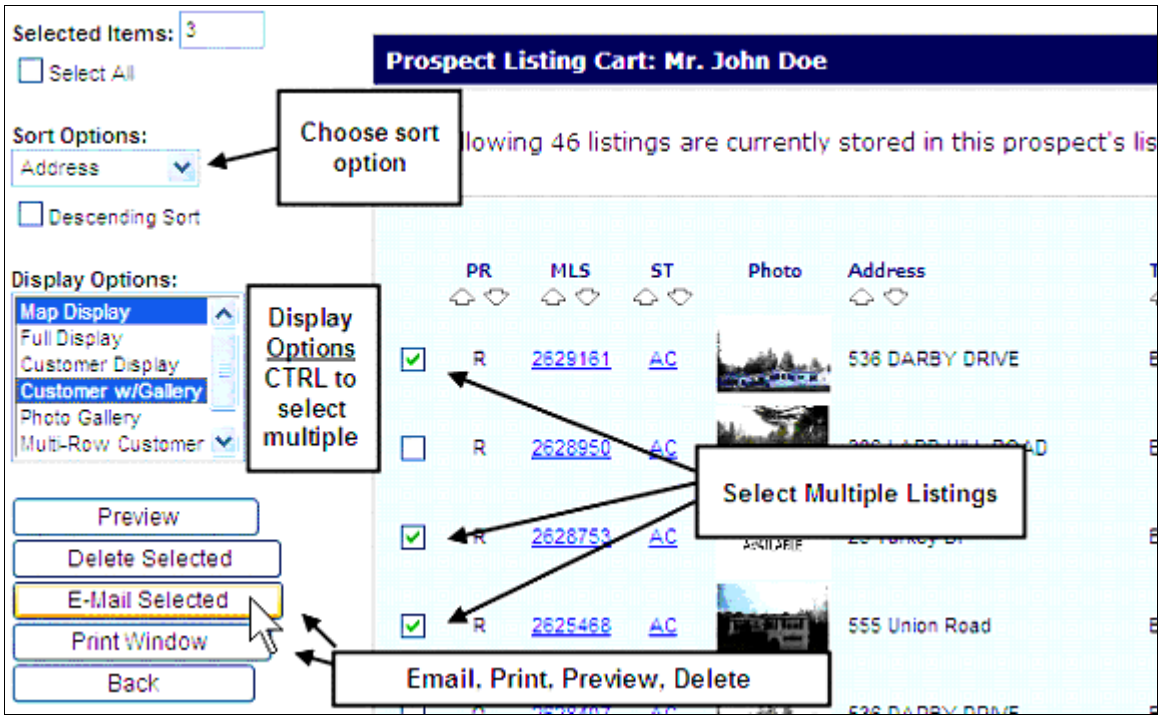
Listing Cart (agent view)

From the Prospect Manager, you will have links to view any of your prospects' listing carts. You can also see the listings that have been deleted from their carts. Once a listing has been in the deleted section for sixty days, it will be purged completely. Clicking on the number links will take you to these listings. From there you can email, print, and preview in multiple displays at once, or restore deleted listings back to the active cart.



From the Prospect Manager, you can also see the last time anything was added to the prospects' cart, as well as the last time they logged in to their cart to view their listings.

When inside the prospect's cart, you can do several things with the listings.



One of the sort options in the dropdown is to sort by **"Order Selected".** This allows you to sort the listings in the cart, in the order that you check them. You could check off listings in the order you would like to see them, choose "Order Selected" from the sort field, and preview, email, or print those listings in that order.

How Are Listings Added to a Prospect's Cart?

Two ways, automatically or manually. Every night InnoVia runs a search, and any new listings, listings that came back on the market, or listings with changes that match your prospect's criteria, will be automatically placed in your prospect's cart. **ONLY 25** listings can be added at one time, each night, per prospect, by the automatic prospect searches. Any remaining listings will be added the next night. If your prospect searches are consistently returning more listings than the maximum, it may be advisable to narrow the search criteria. **ALSO**, there can only be a maximum of **100 listings** in a prospect's active cart at one time. Once any additional listings are added, the same number of the oldest listings will be deleted from the cart. Remember, deleted listings are kept 60 days, then purged.

You can also **manually** add listings to a prospect's cart two ways. First, by using the Search for Matches button described earlier, or from any regular search results page in InnoVia. To do this:

- Check off the listing(s) you want to add to the prospect's cart
- Click on the "Use Checked" button
- Select the "Prospect Cart" option, and click "Show Selection"
- A window will appear, where you will select the prospect's name from a list. This will place the listings in the Prospect's cart.

Whenever a listing is added to prospect's cart by the nightly prospecting searches, they will receive an email from InnoVia, notifying them and providing a link to access their cart. This email is **ONLY** sent when listings are added to the prospect's cart **AUTOMATICALLY**, not when listings are manually added by the agent. See the section below for “Notifying Your Prospects”.

*** In some instances, this email could be blocked due to the aggressiveness of your prospect's ISP email filtering system. Your prospect can make sure that they receive system-generated emails from the InnoVia MLS by adding system@**mlsaddress.com** and innovia@**mlsaddress.com** to their address book and, for AOL users, their 'approved list.' (The 'mlsaddress.com' portion will be the web address of your InnoVia MLS system.) Please pass this information along to your prospects.

Remember: In order for a prospect to receive these automatic emails from the system, when you set them up, you must...

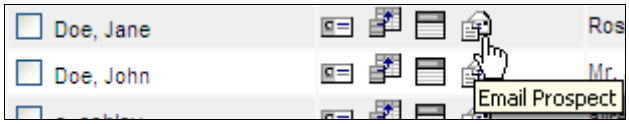
1. Enter a First and Last name (so the login ID and password can be created)
2. Enter an email address for the Prospect
3. Select "Email My Prospect"

If you do not choose to "Email My Prospect", a cart will still be created for the prospect, it just won't be visible to the prospect. *You* can still see what is in their cart from the Prospect Manager, or give them access to their cart at any time by clicking on the "Edit Prospect" button and selecting "Email My Prospect".

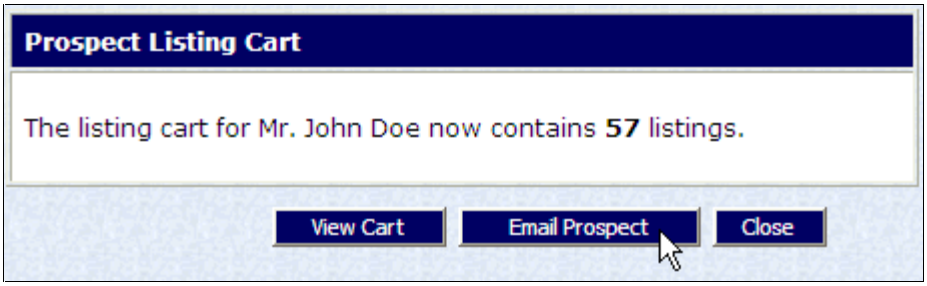
Notifying Your Prospects

Once you have added listings to your prospect's cart, you can send an email notifying them and providing a link to their cart. There are two ways to do this:

- Click on the fourth button next to their name in the Prospect Manager. This will open a pre-populated email message from your default email client (such as Outlook), with a message to your prospect, a link to their cart, and your contact information.



- You can also pull up the same email message when adding listings to the cart from the "Use Checked" button, explained earlier in this topic.

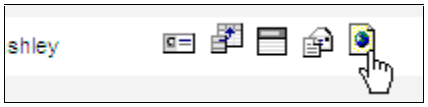


Remember: The automatic emails from InnoVia only are only sent when listings are added to a cart automatically by the nightly prospecting searches. Use this method to notify your prospects when you initially set them up, or when you manually add a listing to their cart.

NOTE: If you click on this link in the email message, to see what the prospect sees, and you are already logged into InnoVia, you will most likely receive an error in the prospect's cart. This is normal, and will not happen for your customer, as they will not be logged into InnoVia.

Prospect's View of Cart

The fifth button next to the prospect's name is the "Prospect's View of Cart".



This allows you to pull up the listing cart as the prospect would see it, without recording that the prospect has logged in to their cart.

What Does the Prospect See?

When a listing is automatically added to a prospect's cart, the prospect will receive an email from InnoVia similar to the one below.

Dear Thomas

19 listing have been added to your Listing Cart.

Click here to access your Listing Cart.

You can access your Listing Cart at any time by going to http://www.nnerenmls.com/nne/portal.html
Your login is trobe and your password is 62s4

Sincerely,

When they click the link or log in to the Listing Cart they will see all of the listings that have been added to their cart, the most recently added listings at the top.

6683 E Turner Camp Road, Inverness, FL 34450
$480,000
3 Bedrooms 2 Full Baths 2,413 SqFt 55 Acres Built in 1979
Peace, Tranquility and County Living at its finest. Beautiful 55 acres mol on Lake Cato with Ranch style home 3 bedroom, 2 bath, swimming pool, pastures fenced and cross fenced. Less than one mile from town of Inverness.
06/21/07 Price Reduced from $499,500
Added 07/03/2007

For each listing they can do several things.

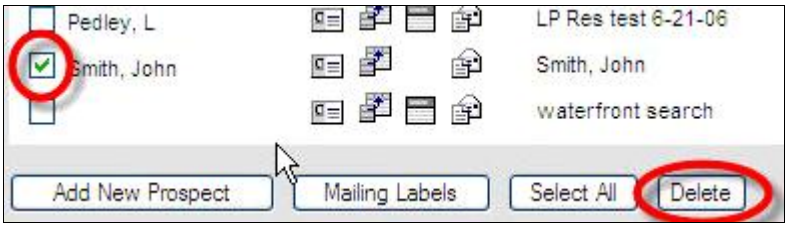
See a detailed view of the Listing
View additional photos for the listing
Take a virtual tour (if available)
Print the detailed view
Email the detailed view to others
Delete this listing from your cart
Email your agent

Each listing is dynamically updated in the prospect's cart, as soon as changes are made in InnoVia, such as price changes. The prospect will also be able to see if listings are no longer available. (The Association decides what constitutes a listing being "No Longer Available"). These listings do not get automatically deleted from the cart.

NE, ALBUQUERQUE, NM 87122
4 Bedrooms 2 Full Baths 2 3/4-Baths 1 Half-Ba
in 1990
This listing is no longer available
ALBUQUERQUES MOST DESIRABLE LOCATION...SAN

Deleting a Prospect

From the Prospect Manager, check off the prospect you would like to delete, and click the delete button at the bottom



Other Features

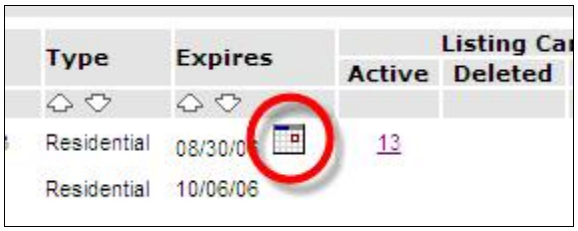
You can also create mailing labels for your prospects and email multiple prospects at one time from the Prospect Manager. Simply check off the appropriate prospects, and click on the corresponding button. If emailing, the email options window will open. If creating mailing labels, you will choose what type of labels to print them on, and they will open in a PDF file for you to print.

The **Summary** button will allow you to create a summary report for your prospects, showing contact info, search criteria, expiration dates, property type, and email functionality. Simply check off your prospect(s), and click on the **Summary** button at the bottom of the Prospect Manager.

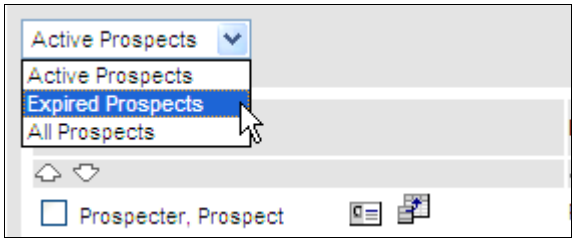
Prospect Expiration Dates

When you save a prospect in the prospect manager, he/she is automatically given an expiration date 6 months from when you saved them. When this expiration date is reached, the system stops sending automatic notifications for that prospect. It does NOT delete the prospect at this point.

From the prospect manager you can see the expiration dates for all of your active prospects. If an expiration date is coming in the next 30 days, you will see a calendar button, that when clicked, will extend the expiration date another 60 days from today.



When a prospect does expire, they will be automatically moved into the “Expired Prospects” section. In the upper left corner of the Prospect Manager, you can choose to view your Active, Expired, or All of your prospects. Simply choose an option from the drop-down list.

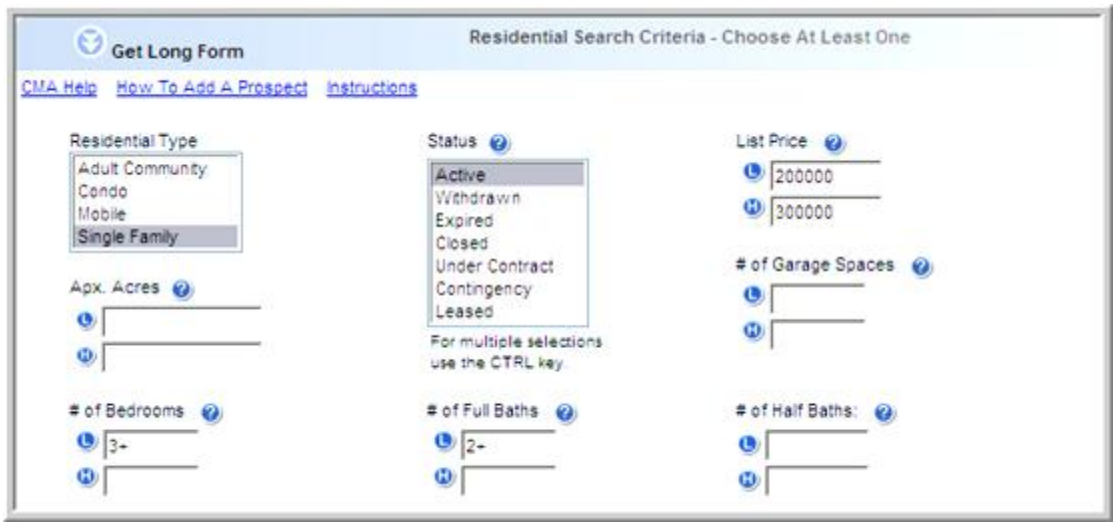


If you need to extend the expiration date of a prospect, click on the “extend” button (as illustrated above), and the prospect will be moved back to the “Active Prospects”

Saving Prospects from Search Screens

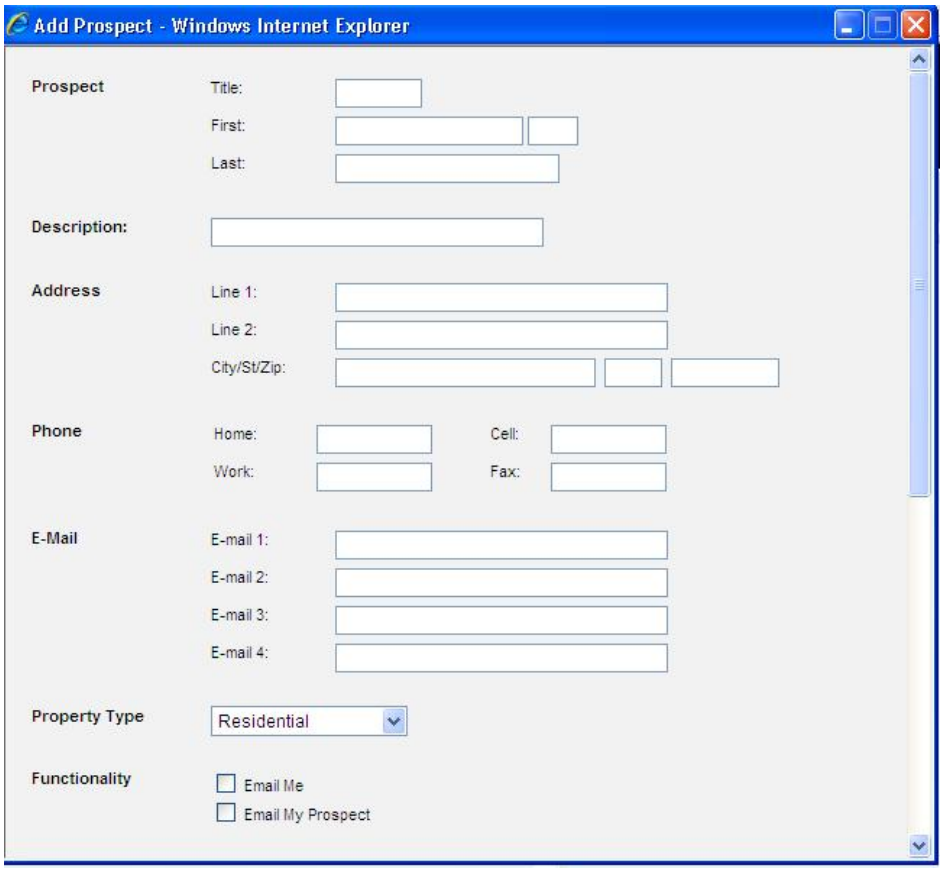
InnoVia™ also gives you the ability to set up prospects from the property type search pages. To set up a prospect:

Enter the search criteria for the type of listing your customer wants into the search screen. Remember: You CAN use the Map Based Search as part of your prospects' criteria. Refer to the Map Based Search instructions.



After selecting the search criteria, click on "Save Prospect" (do not click "Search").

When you click on "Save Prospect", the screen pictured below will appear. Enter the contact information for your prospect and click "OK".

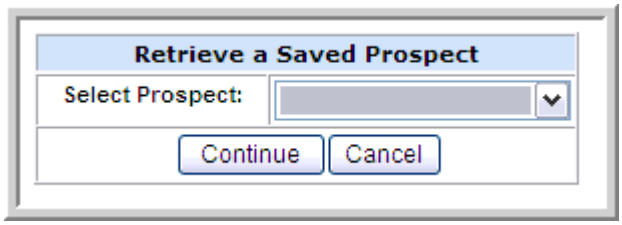


Once your prospect is saved, simply click the button to go back to the Prospect Manager, where you can place listings in the prospect's cart, as illustrated earlier.

Modifying Prospects from Search Screens

To access your saved prospects, click the "Get Prospect" button, from the search page that you save them.

Once the "Retrieve a Saved Prospect" window appears, use the drop down to select a prospect, then click "Continue".



Once you click on "Continue", the search screen will automatically populate the prospect's search criteria. Edit the information by adding to the criteria present, or removing any criteria no longer needed by the prospect.

To save changes, click on "Save Prospect" and the contact information page will be displayed. Here you can change contact information as needed. Once you are done, click "OK" and the changes will be saved.

If you want to delete the prospect, click "Delete" on the contact information page.

ProspectPRO

The following instructions will explain the additional features available in InnoVia's ProspectPRO. NOTE: ProspectPRO is not available in every MLS. Contact your local association office for information.

ProspectPRO is divided into 3 sections:

Incoming Prospect Messages (1)
Shows messages and requests for showings from your prospects

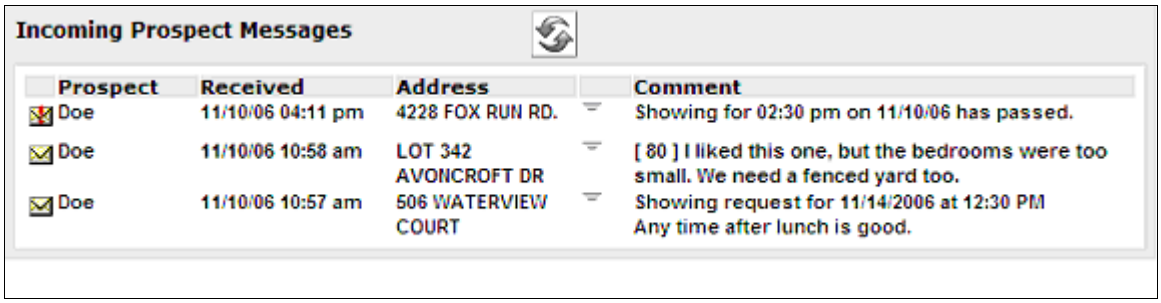
Upcoming Showings (2)
A schedule of all your upcoming showings, broken out by date and time

Prospect Manager Module (3)
Roster of prospects, adding new prospects, saving criteria, etc. (as explained previously)

Note: The Prospect Manager Module (3 above) has one additional column not shown in the instructions above. "Last Activity" is the last time that the prospect performed some sort of activity with a listing, such as adding a comment or scheduling a showing, which is covered later in these instructions.

Incoming Prospect Messages

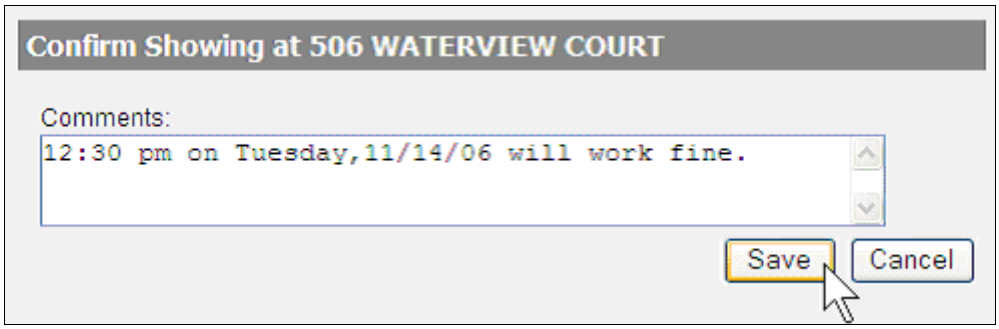
In ProspectPRO, a prospect has some additional options when looking at the listings in their cart, such as scheduling a showing, rating the listings, and providing feedback on a listing. When a prospect performs one of these functions, a message will show in the "Incoming Prospect Messages" section of the Prospect Manager. For each incoming message, there is a dropdown arrow that gives the agent several options, depending on the type of message sent.



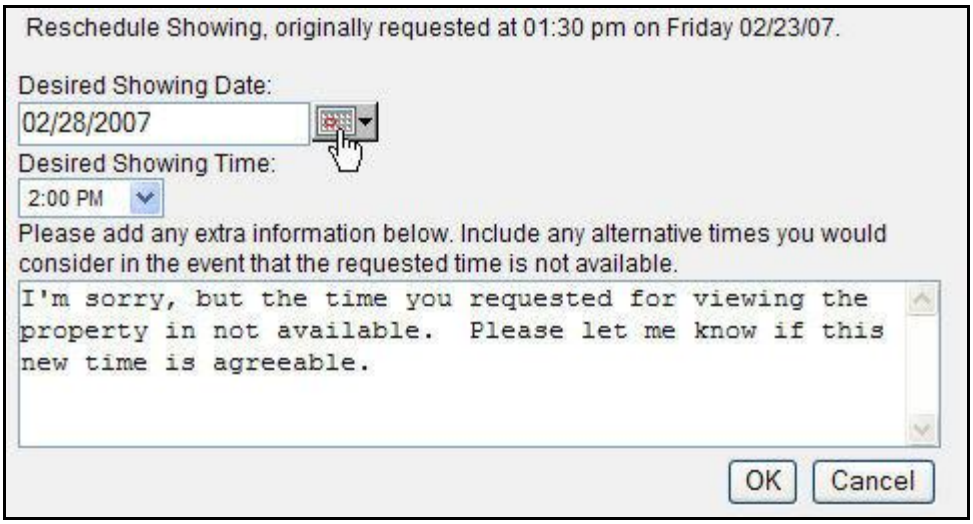
In the above example, there are three types of messages. The first is system generated message, letting the agent know that one of his/her scheduled showing times has passed. The second is a message from a prospect, commenting on a listing, and giving the listing a rating of 80 out of 100. The third message is a request for a showing. Clicking on the drop-down arrow to the left of the comment gives the agent several options, depending on the type of message:

Viewing the prospect's profile
Viewing the full display or listing history of that listing
Viewing notes (previous messages between the agent and prospect)
Viewing the showing instructions
Rescheduling the showing
Confirming the showing
Canceling the showing (not shown)
Marking the message as read (not shown)
Mark the showing as Complete (not shown)

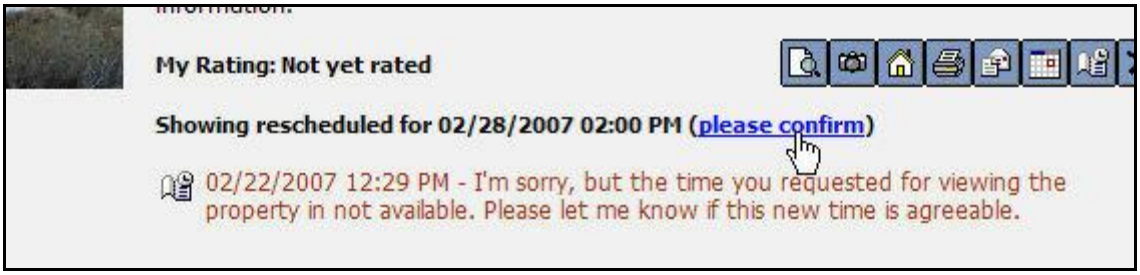
For example, if the agent clicks "Confirm Showing", a message box will pop up with a pre-written message, which can be edited if necessary, to confirm the showing with the prospect. When the agent clicks "Save", the message will then appear in the prospect's cart, right below the corresponding listing, and that listing will move to the top of the cart.



When rescheduling a showing, again, a box will appear to choose a reschedule time and enter a custom message.


Reschedule Showing, originally requested at 01:30 pm on Friday 02/23/07.
Desired Showing Date:
02/28/2007
Desired Showing Time:
2:00 PM
Please add any extra information below. Include any alternative times you would consider in the event that the requested time is not available.
I'm sorry, but the time you requested for viewing the property in not available. Please let me know if this new time is agreeable.
OK
Cancel

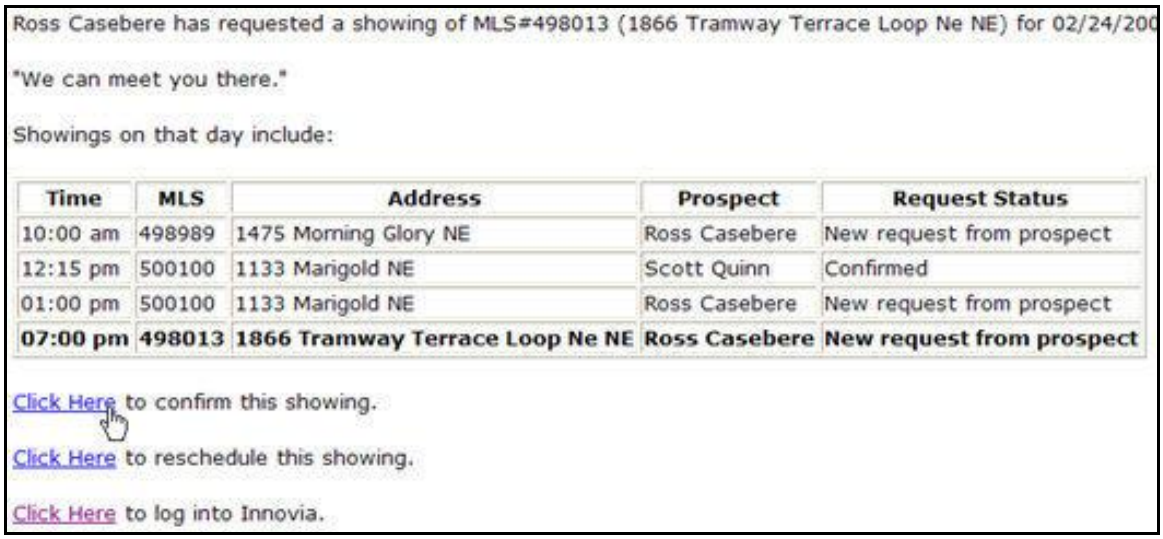
In the case of a reschedule, the customer will see a message in their cart, right next to that listing. There will be a link to confirm the rescheduled time. Once the showing is confirmed by the prospect, the agent will receive an email AND a message in the incoming messages section, confirming the showing.


My Rating: Not yet rated
Showing rescheduled for 02/28/2007 02:00 PM (please confirm)
02/22/2007 12:29 PM - I'm sorry, but the time you requested for viewing the property in not available. Please let me know if this new time is agreeable.

There is a refresh button, , at the top of the Incoming Messages section as well. Once you have marked a message as read, replied to the message, confirmed or rescheduled a showing request, or other action, clicking the refresh button will clear that message from the list.

Agent Notifications

Whenever a prospect requests a showing or confirms a rescheduled showing, you will receive an email notification (to the email address saved in your InnoVia profile), in addition to the incoming message in the Prospect Manager. This email will allow you to confirm or reschedule the showing directly from the email message, and will also show you a schedule of the showings you already have scheduled for the requested day. If you confirm or reschedule, the prospect will be notified in their cart, just as if you had done it from Prospect Manager. The email will also contain a link to InnoVia.



Ross Casebere has requested a showing of MLS#498013 (1866 Tramway Terrace Loop Ne NE) for 02/24/200

"We can meet you there."

Showings on that day include:

Time	MLS	Address	Prospect	Request Status
10:00 am	498989	1475 Morning Glory NE	Ross Casebere	New request from prospect
12:15 pm	500100	1133 Marigold NE	Scott Quinn	Confirmed
01:00 pm	500100	1133 Marigold NE	Ross Casebere	New request from prospect
07:00 pm	**498013**	**1866 Tramway Terrace Loop Ne NE**	**Ross Casebere**	**New request from prospect**

Click Here to confirm this showing.

Click Here to reschedule this showing.

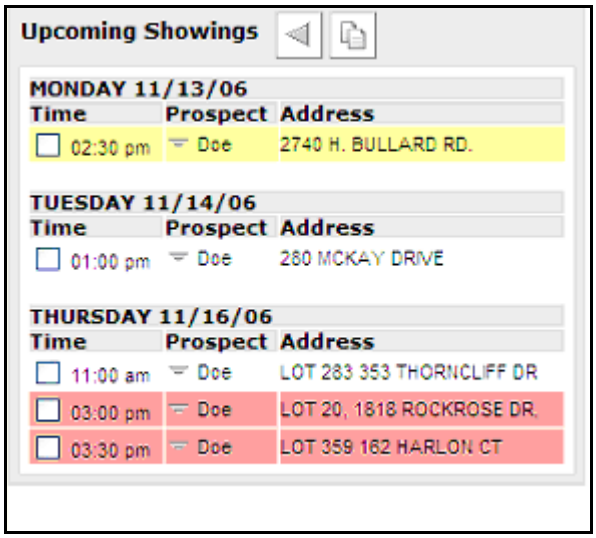
Click Here to log into Innovia.

*** Please do not REPLY to these email notifications, they are NOT coming directly from your prospects.**

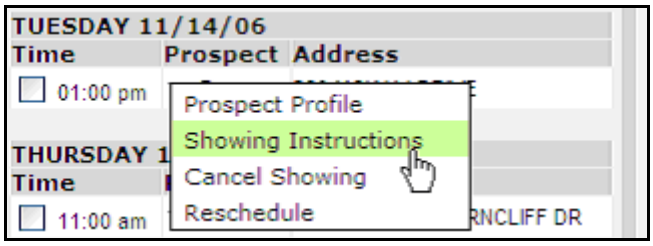
Whenever there is any kind of new message in the Incoming Messages section, you will also see a notification on the home page in InnoVia. The Prospect Manager icon on the right will flash with a red **NEW MESSAGE(S)**

Upcoming Showings

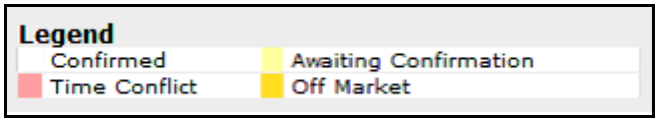
Once an agent confirms a showing request from the Incoming Prospect Messages section, that showing moves over into the Upcoming Showings section of the Prospect Manager. This section is divided by date and time, to show all the upcoming showings that the agent has confirmed. This section also has the drop-down arrow that allows the agent to do several things for each showing.


Upcoming Showings
MONDAY 11/13/06
Time Prospect Address
02:30 pm Doe 2740 H. BULLARD RD.
TUESDAY 11/14/06
Time Prospect Address
01:00 pm Doe 280 MCKAY DRIVE
THURSDAY 11/16/06
Time Prospect Address
11:00 am Doe LOT 283 353 THORNCLIFF DR
03:00 pm Doe LOT 20, 1818 ROCKROSE DR.
03:30 pm Doe LOT 359 162 HARLON CT

For example, clicking the drop-down arrow next to a showing that's already confirmed gives the options to pull up the prospect's profile, view the showing instructions, cancel the showing, or reschedule the showing. Again, in the case of canceling or rescheduling, a message would appear in the prospect's cart right below that listing.



The scheduled showings will be displayed in 1 of 4 colors in the Upcoming Showings section.



White – confirmed showing

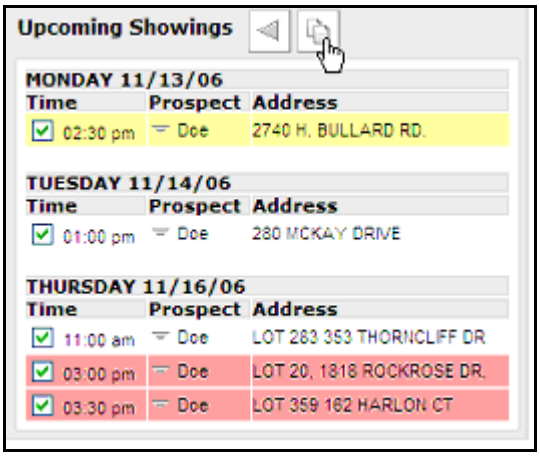
Yellow – awaiting confirmation from the prospect, such as a reschedule

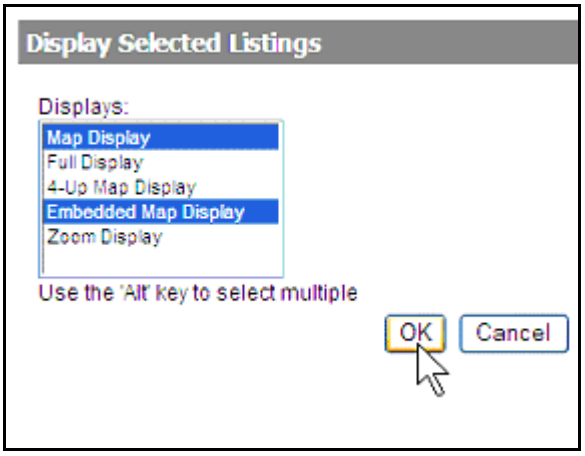
Orange – this listing no longer on the market, the agent will need to let the prospect know by canceling the showing

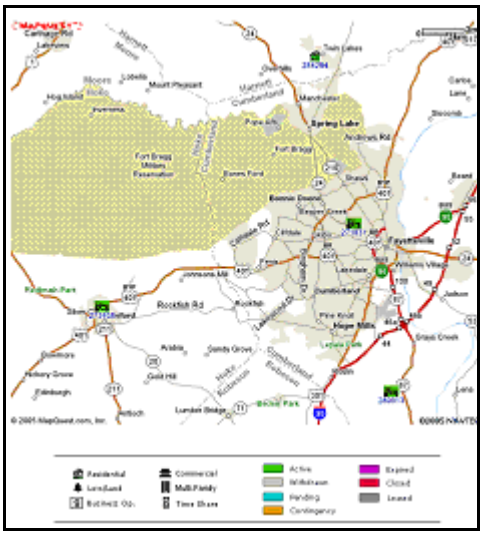
Red – showings will show in red if they have been scheduled within 1 hour of another showing, indicating a schedule conflict. The agent may want to reschedule if necessary.

At the top of the Upcoming Showings section, there is a button that allows the agent to pull up the listings that are scheduled for showings, in a number of different displays. Simply check off the appropriate showings, and click on the display button at the top. From the resulting window, select the desired display and click OK. Holding the CTRL key will allow the selection of more than one display at a time.

For example the agent could check off several showings, and print up a detail display as well as a map showing the location of all the showings.

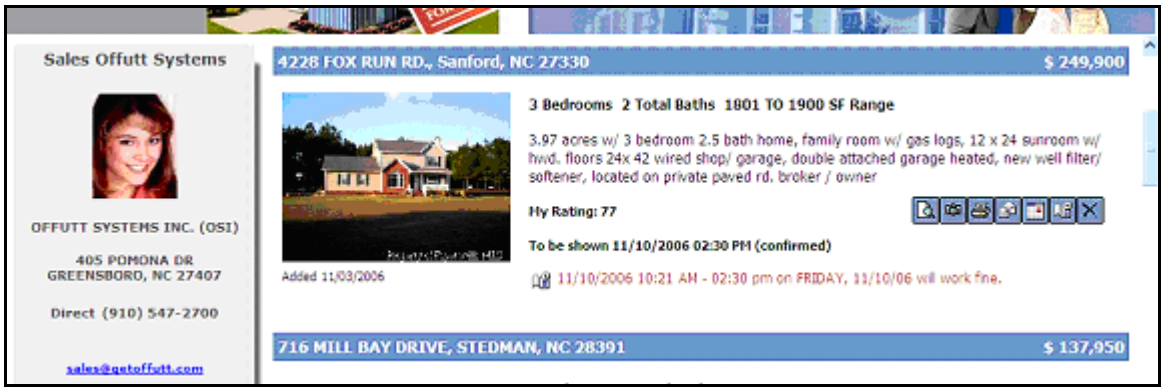

Upcoming Showings
MONDAY 11/13/06
Time Prospect Address
02:30 pm Doe 2740 H. BULLARD RD.
TUESDAY 11/14/06
Time Prospect Address
01:00 pm Doe 280 MCKAY DRIVE
THURSDAY 11/16/06
Time Prospect Address
11:00 am Doe LOT 283 353 THORNCLIFF DR
03:00 pm Doe LOT 20, 1818 ROCKROSE DR.
03:30 pm Doe LOT 359 162 HARLON CT



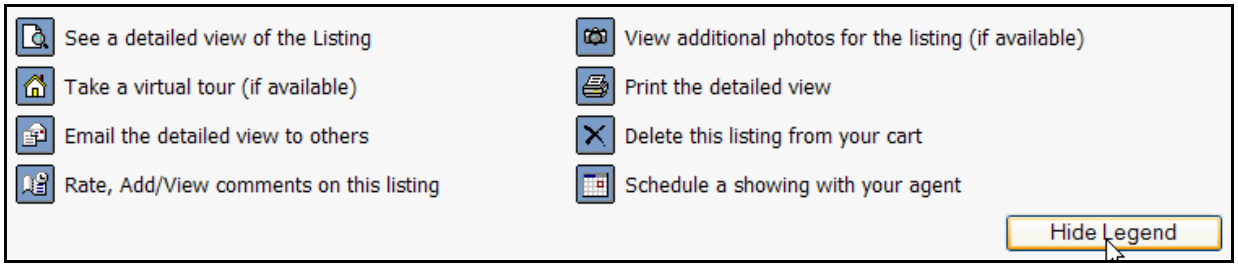


Prospect Cart (ProspectPRO)

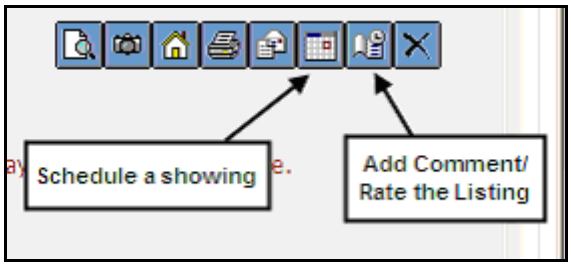
A ProspectPRO cart (what the customer sees) will be branded with the agent's picture, contact info, email address, and website, to be shown on the left side of the cart at all times.

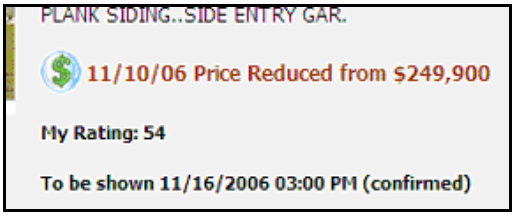

Sales Offutt Systems
OFFUTT SYSTEMS INC. (OSI)
405 POMONA DR
GREENSBORO, NC 27407
Direct (910) 547-2700
sales@getoffutt.com
4228 FOX RUN RD., Sanford, NC 27330
$ 249,900
3 Bedrooms 2 Total Baths 1801 TO 1900 SF Range
3.97 acres w/ 3 bedroom 2.5 bath home, family room w/ gas logs, 12 x 24 sunroom w/ hwd. floors 24x 42 wired shop/ garage, double attached garage heated, new well filter/ softener, located on private paved rd. broker / owner
My Rating: 77
To be shown 11/10/2006 02:30 PM (confirmed)
Added 11/03/2006
11/10/2006 10:21 AM - 02:30 pm on FRIDAY, 11/10/06 will work fine.
716 MILL BAY DRIVE, STEDMAN, NC 28391
$ 137,950

There will be a Legend at the top of the cart, to give the prospect a brief description of what each button does.

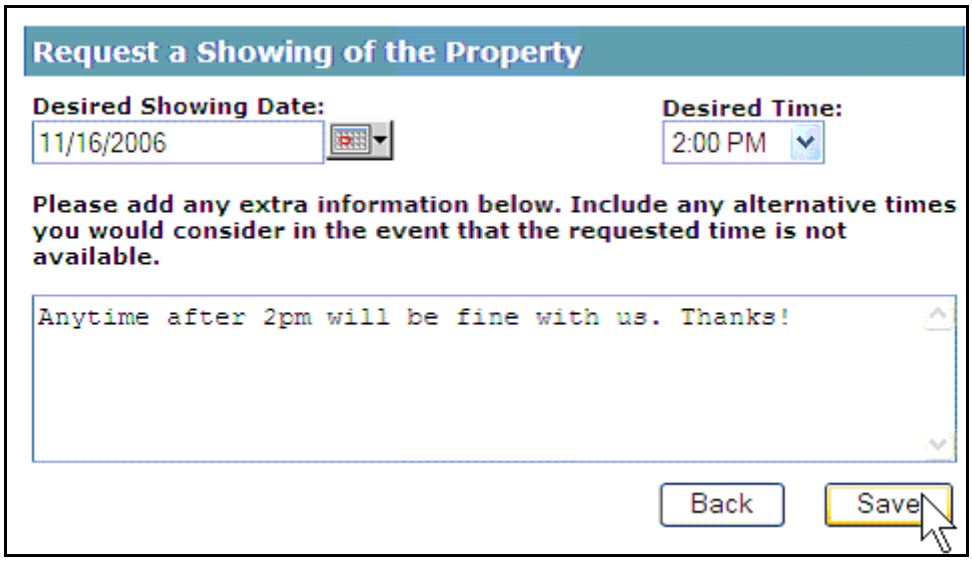

See a detailed view of the Listing
Take a virtual tour (if available)
Email the detailed view to others
Rate, Add/View comments on this listing
View additional photos for the listing (if available)
Print the detailed view
Delete this listing from your cart
Schedule a showing with your agent
Hide Legend

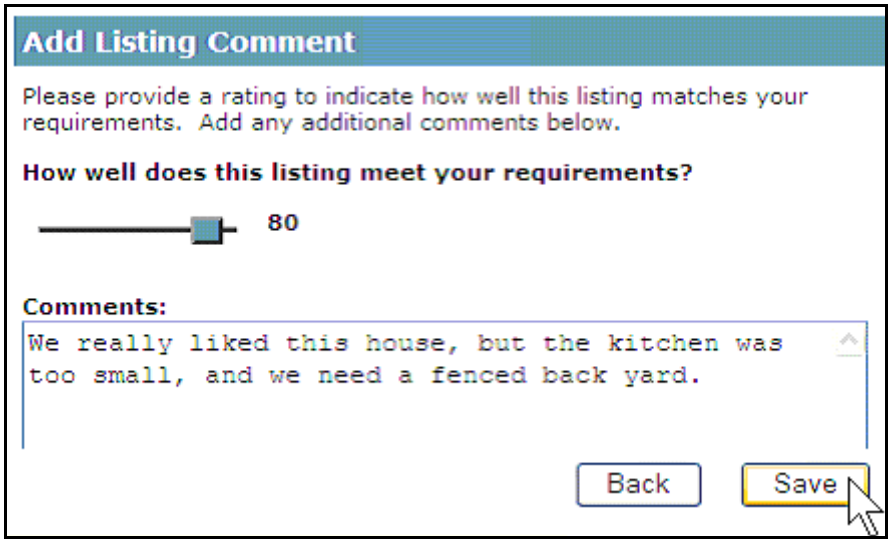
For each listing, the prospect has buttons to schedule a showing as well as send comments to their agent and rate the listings. Any messages sent by the agent, such as confirmed showings, requests to reschedule, or any other comments, will be displayed under the respective listings.





When scheduling a showing or adding comments on the listing, the prospect simply clicks the save button, and a message will show in the "Incoming Prospect Messages" section of the Prospect Manager, as illustrated earlier. Also, when scheduling a showing, the agent receives an email notification, also explained earlier.

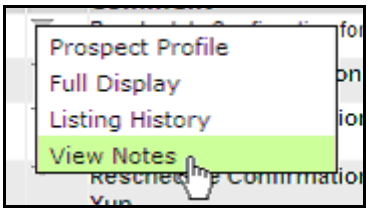

Request a Showing of the Property
Desired Showing Date:
11/16/2006
Desired Time:
2:00 PM
Please add any extra information below. Include any alternative times you would consider in the event that the requested time is not available.
Anytime after 2pm will be fine with us. Thanks!
Back
Save


Add Listing Comment
Please provide a rating to indicate how well this listing matches your requirements. Add any additional comments below.
How well does this listing meet your requirements?
80
Comments:
We really liked this house, but the kitchen was too small, and we need a fenced back yard.
Back
Save

A prospect can rate a listing and add comments as many times as they would like, and each time they do, the agent will get a notification in the prospect manager.

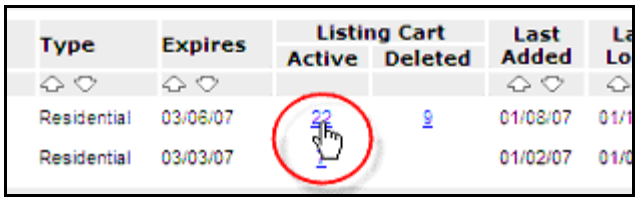
There are a few places in the prospect manager where the agent can view past comments and/or add additional comments to be sent to the prospect's cart.

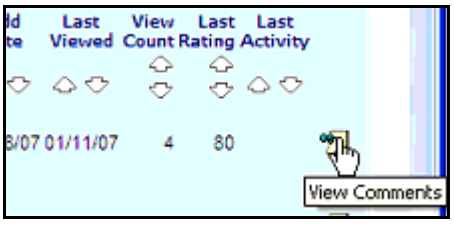
- As illustrated earlier, when a comment or request for showing comes to the agent, they can click on the drop down arrow next to the comment and select "View Notes"



Casebere, Ross comments on MLS# 493637 10000 Florence NE
Date
Rating
Prospect Comments
Agent Comments
01/08/07 07:46 am
Reschedule Confirmation for 01/18/2007 at 08:45 AM
01/08/07 07:46 am
I'm sorry, but the time you requested for viewing the property in not available. Please let me know if this new time is agreeable.
01/05/07 10:29 am
11:45 am on Wednesday01/17/07 will work fine.
01/05/07 10:29 am
Showing request for 01/17/2007 at 11:45 AM
test
Print
Close
Add Comment

- The agent can also see comments for a specific listing by accessing that prospect's cart from the prospect manager, and clicking on the "View Comments" button on the right.





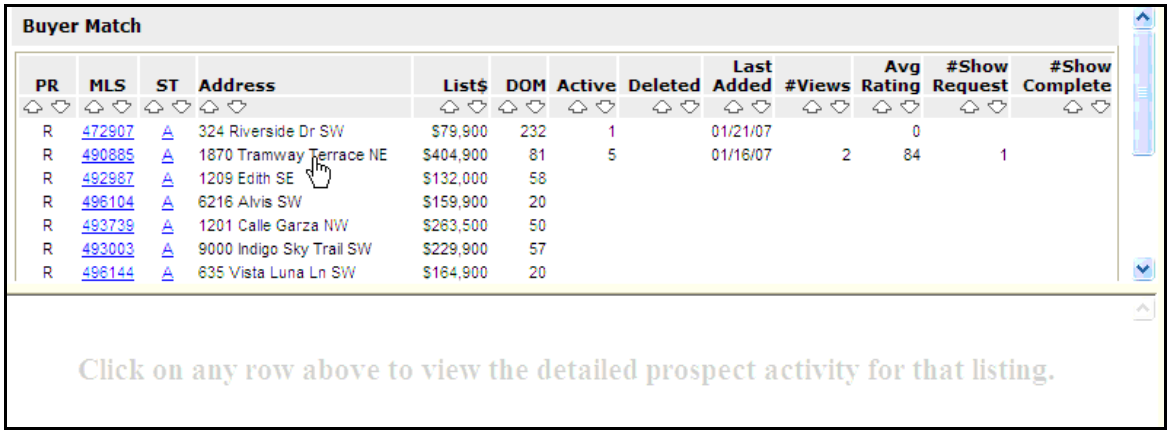
- From here the agent can also see the last time the prospect viewed the detail display of that listing, how many times they have viewed it, the last rating they gave it, and the last date of any activity or changes to that listing.

Buyer Match

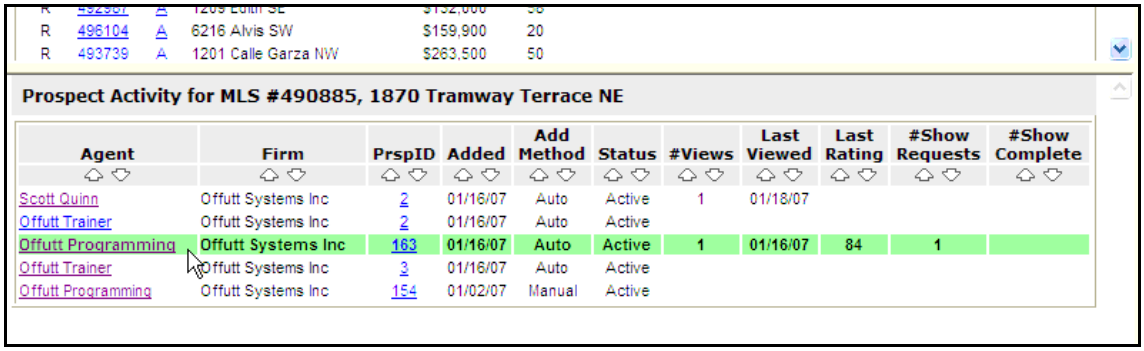
The Buyer Match tool is a powerful program that allows an agent to see how many potential buyers have been entered into InnoVia, with criteria matching the listings in their inventory. The Buyer Match button will be located on the right side of the My InnoVia home page.
Note: This program may not be available in your MLS.

The screen is divided into 2 panes. The upper pane will be your listing inventory. Included in this pane are several columns with information for each listing:

- **Active** - this is how many active carts of other prospects in which your listing resides.
- **Deleted** - how many carts your listing has been deleted from, by the prospect, the agent, or the system (the oldest listings are deleted by the system when the maximum number of listings, 100, is reached in a prospect cart).
- **Last Added** - the last time your listing was added to a prospect's cart
- **#Views** - how many times other prospects have clicked to view the detail display of your listing in their cart
- **Avg Rating** – the average rating given to this listing by prospects in their listing carts (only available for those agents who have ProspectPRO)
- **#Show Request** – the number of times a prospect has requested to schedule a showing of this property from their listing cart (only available for those agents who have ProspectPRO)
- **#Show Complete** – the number of completed showings for this listing (only available for those agents who have ProspectPRO)


Buyer Match
PR MLS ST Address List$ DOM Active Deleted Last Added #Views Avg Rating #Show Request #Show Complete
R 472907 A 324 Riverside Dr SW $79,900 232 1 01/21/07 0
R 490885 A 1870 Tramway Terrace NE $404,900 81 5 01/16/07 2 84 1
R 492987 A 1209 Edith SE $132,000 58
R 496104 A 6216 Alvis SW $159,900 20
R 493739 A 1201 Calle Garza NW $263,500 50
R 493003 A 9000 Indigo Sky Trail SW $229,900 57
R 496144 A 635 Vista Luna Ln SW $164,900 20
Click on any row above to view the detailed prospect activity for that listing.

Clicking anywhere on any of the rows in the top pane will load the bottom pane with detailed prospect activity for that listing, breaking down each individual prospect with matching criteria for that particular listing.


R 496104 A 6216 Alvis SW $159,900 20
R 493739 A 1201 Calle Garza NW $263,500 50
Prospect Activity for MLS #490885, 1870 Tramway Terrace NE
Agent | Firm | PrspID | Added | Add Method | Status | #Views | Last Viewed | Last Rating | #Show Requests | #Show Complete
Scott Quinn | Offutt Systems Inc | 2 | 01/16/07 | Auto | Active | 1 | 01/18/07
Offutt Trainer | Offutt Systems Inc | 2 | 01/16/07 | Auto | Active
Offutt Programming | Offutt Systems Inc | 163 | 01/16/07 | Auto | Active | 1 | 01/16/07 | 84 | 1
Offutt Trainer | Offutt Systems Inc | 3 | 01/16/07 | Auto | Active
Offutt Programming | Offutt Systems Inc | 154 | 01/02/07 | Manual | Active

The first few columns will show the Name and Firm Name of the agent who owns each prospect. Clicking on the agent name will open a window with the rest of their contact information.

The Prospect ID column shows the ID number that was assigned to that prospect when he/she was saved in InnoVia. Clicking on this number will load a window showing a summary of that prospect's search criteria. This prospect ID is also a column in the Prospect Manager.

The remaining columns give information on the activity of that particular prospect and listing:

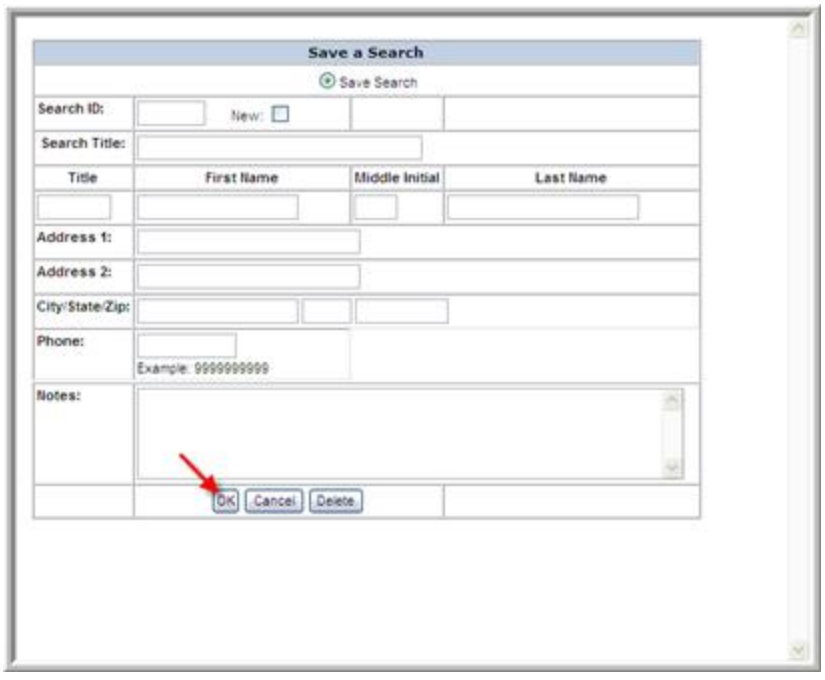
- **Added** – the date the listing was added to the prospect's cart
- **Add Method** – was the listing added to the cart manually, by the agent, or automatically, by the InnoVia prospect searches?
- **Status** – where is this listing currently located, in the Active or Deleted section of the prospect's cart?
- **# Views** – the number of times the prospect has clicked to view the detail display of this listing in their cart
- **Last Viewed** – the date of the last time the prospect clicked to view the detail display of this listing in their cart.
- **Last Rating** – the last rating that this prospect gave to this listing in their listing cart (only available for those agents who have ProspectPRO)
- **#Show Requests** – the number of times this prospect has requested a showing of this property in their listing cart (only available for those agents who have ProspectPRO)
- **#Show Complete** – number of showings completed by this prospect and their agent for this property. (only available for those agents who have ProspectPRO)

Saving a Search

InnoVia™ gives you the option to save specific search criteria for later use. It works just like saving a prospect. However, you are just saving the search criteria that you input, and you are not generating automatic emails to clients.

From the property type search screen (residential, vacant land, commercial, etc.), enter the search criteria you want to save and click "Save Search" (not "Search").

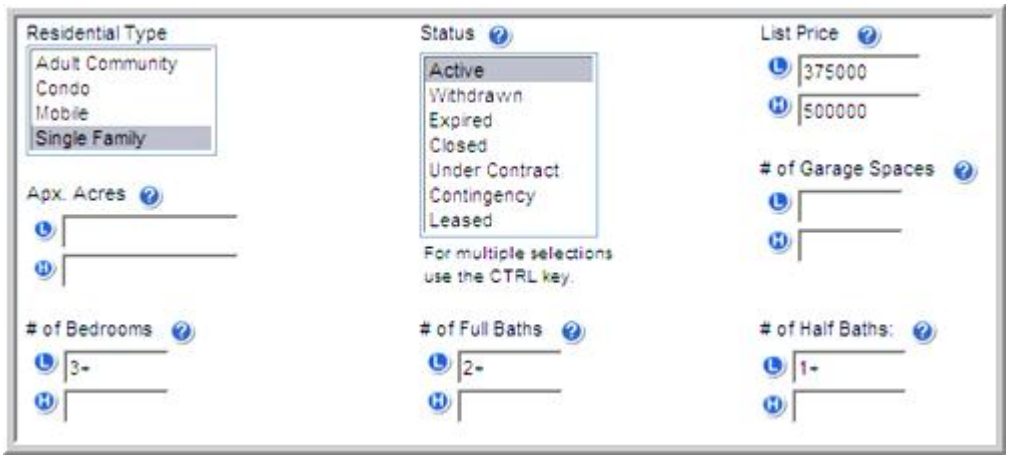
After clicking "Save Search", a window appears for entering information regarding the search you saved. Fill in the information, click "OK" and the search criteria you entered will be saved.



To run a saved search, click "Get Search" and a pop-up window will appear.

Select the search you want to execute from the drop down list, and click "Continue".

The criteria you saved will be displayed. Click "Search" to run the saved search.

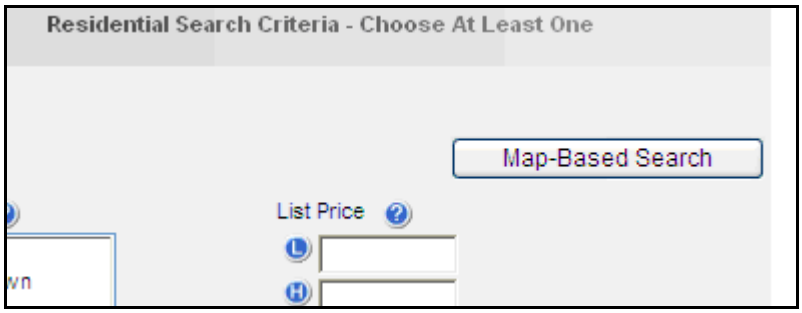


Deleting a Saved Search

To delete a saved search, bring the search up using the "Get Search" button. Once the search is up on your screen, click on the "Save Search" button. At the bottom of the save window, there is a delete button. Simply click it, and your saved search will be deleted.

Map Based Search

The Map-Based Search allows you to search a user-defined area on the map for listings. Microsoft's Virtual Earth maps are incorporated into the property type search pages. Simply access the appropriate property type search page from the Search menu, and there will be a Map-Based Search button in the upper right corner.

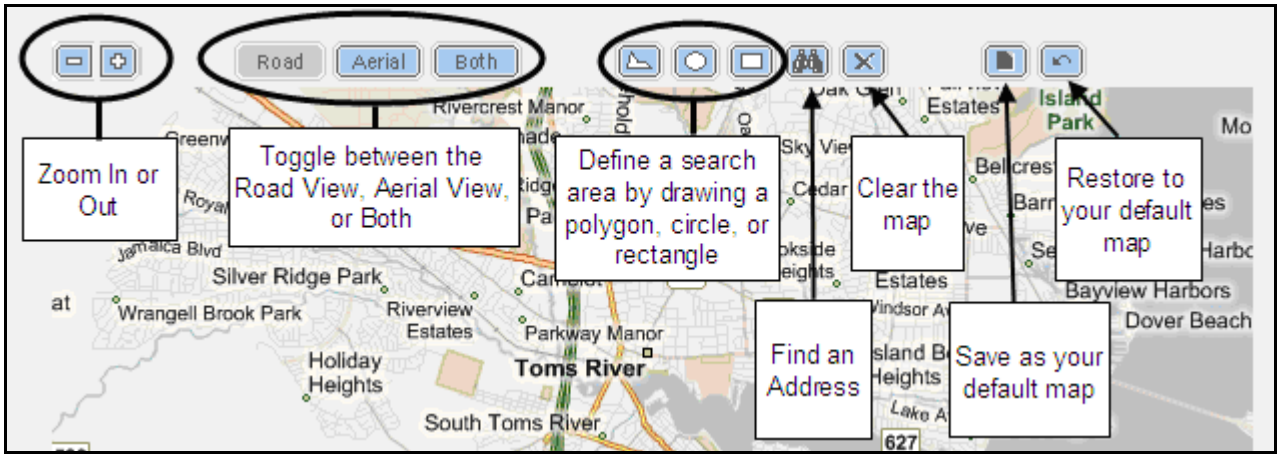


This will load a map on the top of the search form. To minimize the map, click "Hide Map" in the lower right corner, below the map.

If using a map when searching, the results will come up on a map by default. If not using a map, the results will come up in the default InnoVia display, just as they always have (unless another display is selected).

Using the Map

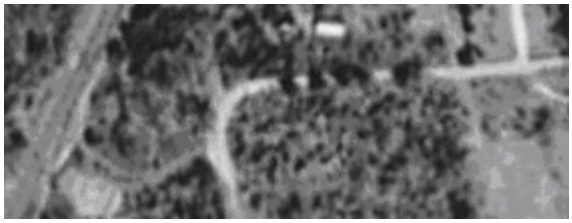
Above the map are a series of buttons, allowing several functions.



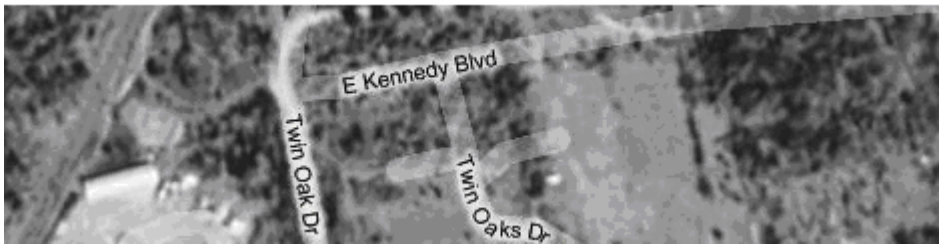
Use the zoom buttons to zoom in or out. ***Double-clicking*** on the map will also zoom in a level on the point that you clicked. If your mouse has a ***scroll wheel*** in the middle, you can also use it to zoom in and out.

Road - Shows generic map with street names

Aerial - Shows satellite images

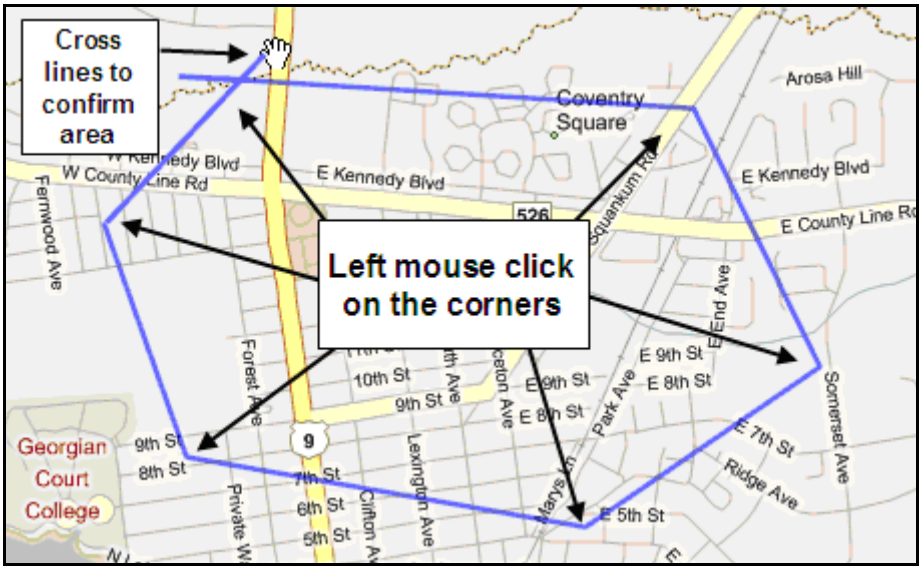


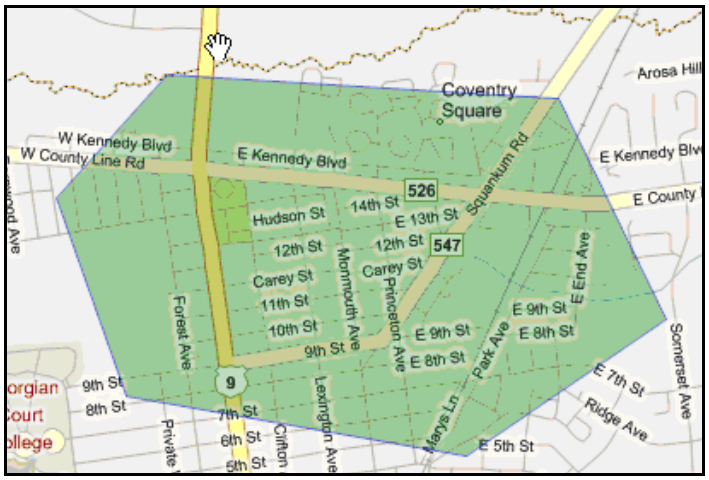
Both – Shows a hybrid map with satellite images and street names



Draw a **Polygon** ****NOTE: Scroll to the top of the page before drawing.**

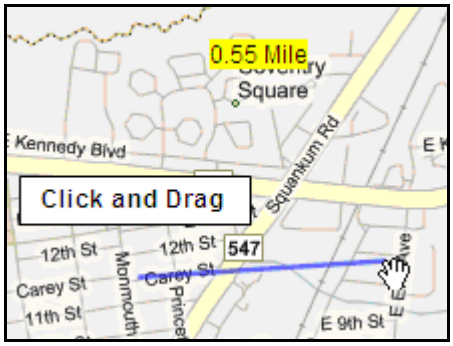
With the polygon, you can draw just about any shape you need. Simply click once on each corner of the area you are outlining (no dragging). In order to confirm the area you are searching, you'll need to cross back over the first line that you drew. The area will turn to a shaded green color once it's confirmed.





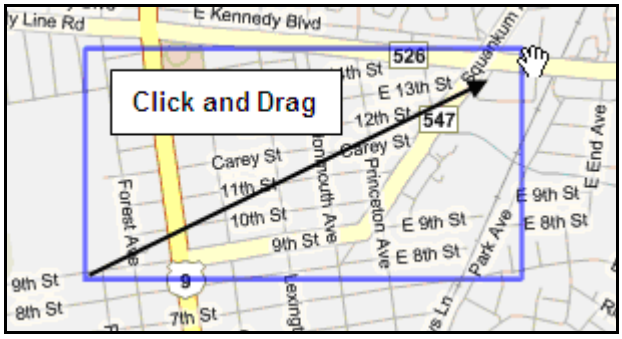
Draw a **Circle** ****NOTE: Scroll to the top of the page before drawing.**

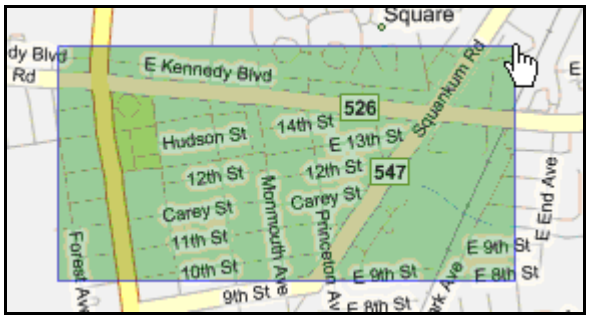
To draw a circle, **CLICK and DRAG** from your center point in any direction. A distance indicator will pop up on the screen, as you drag your mouse, to gauge the distance of the radius of your circle (the distance between the center point and the edge)



Draw a **Rectangle** ****NOTE: Scroll to the top of the page before drawing.**

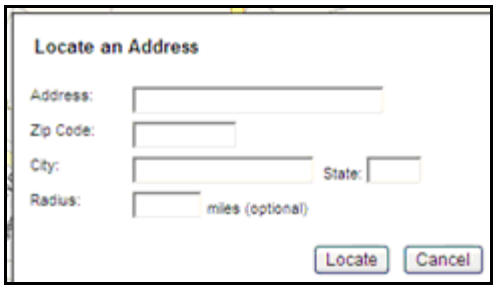
To draw a rectangle, simply CLICK and DRAG in any direction from a starting point. Release the mouse click, and the rectangle will form based on the first point you click, and distance that you drag the pointer.





Find an Address

Use this option to locate a particular address on the map around which you would like to conduct a search, for example: a customer's current address, an office, a school, etc.



Clear the Selection Area - This will clear out any area that you have drawn on the map.

Save as Your Default Map - Use this option to save an area of the map as your default area. Once saved, the map will always open to that exact area from your search pages. This will be your default area on all property type search pages, and until you set a new default map.

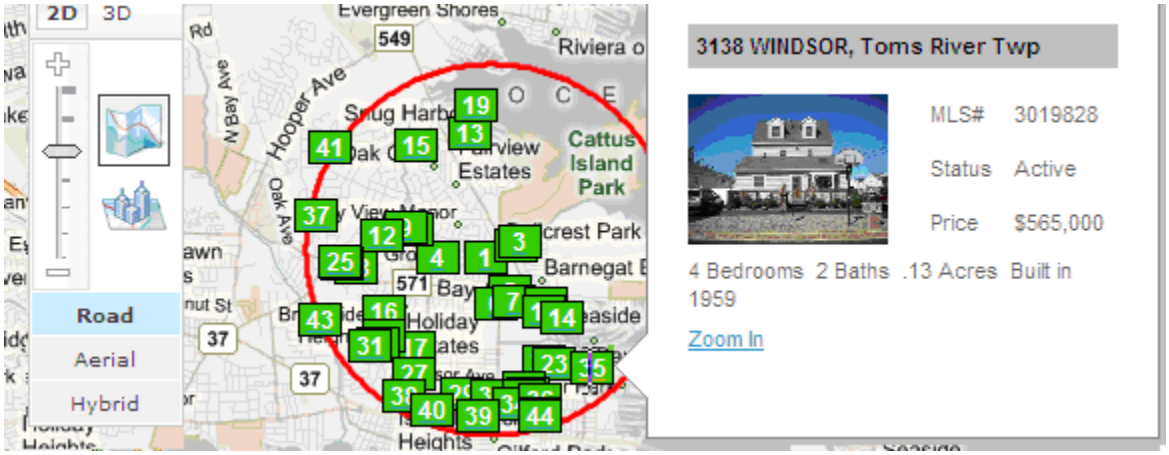
Restore Your Default Map - Use this option to restore your map back to the default area that you had previously saved. The map WILL retain any shapes that you have drawn in other areas. This button does not clear the map, it simply moves it back to your saved default map.

Running the Search

Once you have defined the area on the map to search, simply scroll down and enter any other necessary criteria on the search page. There is no need to choose a display type, the results will open in a default Map Display. Click Search on the left and the matches found box will open as usual. There will not be a Printer-Friendly option, the map results will all load by default, and there is no limit to the number of listings you can bring up in a Map-Based search.

Search Results

Your search results will come up on a map, each listing assigned a number. Below the map, a photo oneliner will also be included for each listing, including that same item number. Hovering your mouse pointer over any listing will automatically open a window, giving some basic listing info, and a link to zoom in on that listing. The oneliner below the map also contains the select check box, giving you all the functionality of the Use Checked function (emailing, printing, CMA's, slide show, etc.).



Select	Item	PT	ST	MLS	Photo	Address	Municipality	SqFt	Sell$	SellDt	DOM	Sell/ List	Photos	Dist (Mi)
☐	1	R	A	3019886		1130 Audubon Dr	Toms River Twp	1,142			12		1	0.17

There will also be a small window on the map results giving the option to zoom in or out, to toggle between the road view, aerial view, or both. Depending on the area, you may also have the option to view the map in 2 dimensions or in 3D, as well as a “Birds Eye View”

3D - Click the 3D button. Hold down the CTRL key on your keyboard, and click and drag in different directions to pan the map in 3 dimensions.

Bird’s Eye View - Click the Bird’s Eye View button. This will give a more detailed picture at an angle, and you can select to view the area from all 4 directions, North, South, East, or West. Click and drag to move the map. You must be in **2D** mode to use the Bird’s Eye View option.

NOTE: Bird's Eye View may not be available in your area, depending on what Microsoft has available in its mapping database. You may still see the button, but it could be disabled.

Mapping Regular Search Results (without a map-based search)

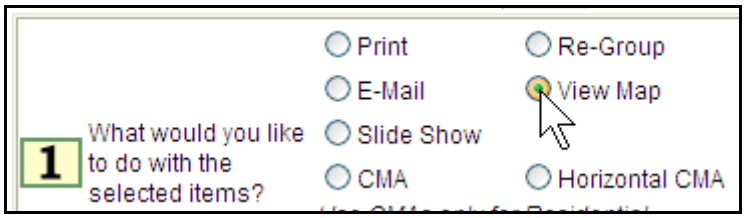
If you run a normal property type search and do not draw an area on the map to search, you can still plot your results on a Virtual Earth map.

At the bottom of the group of buttons on the left side of the page, is the **Map Results** button.

The Map Results button can be used in 2 ways:

1. *To initiate your search*. Use this method if you would like to immediately see your search results on a map, but you are not including the map as part of your criteria (map-based search). In this case, you would use the Map Results button **instead** of the Search button.
2. *To map all of the search results for a search you have already run*. Use this method if you have already ran a regular search, without using the map as criteria. Simply click Map Results, and all of your search results will be mapped. Whether you had clicked Printer-Friendly or Continue, the Map Results button will always map all of your results, not just those on the current page. To map only selected listings, see below.

If you'd like to only map a selected number of listings from your search results, simply check those listings off, click **Use Checked**, and select the **View Map** option. Click Show Selection at the bottom, and InnoVia will plot only those listing that you have checked on a map.

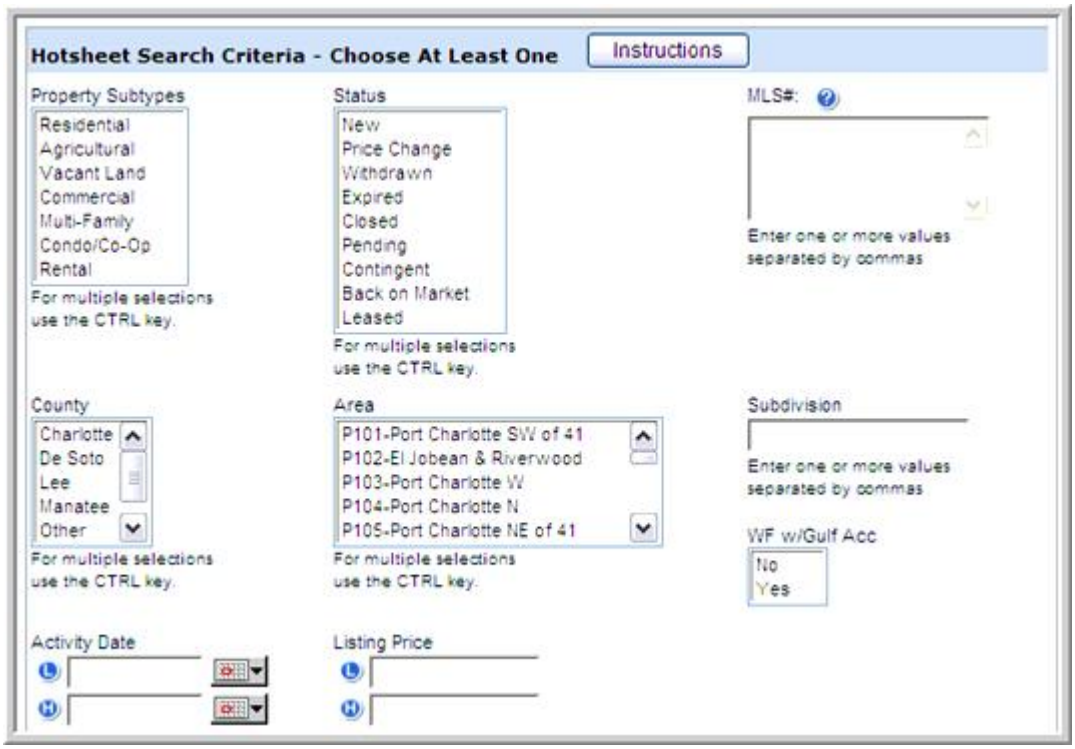


Hotsheet Searches

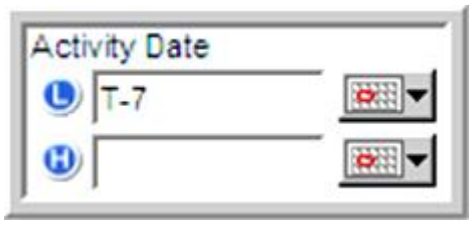
A Hotsheet search allows you to find newly sold, listed, expired, etc. listings. It's the best way to find listings that have changed status within a given time period.

To perform a Hotsheet search, start by pointing to the Hotsheet tab on the InnoVia™ navigation bar.

The search screen pictured below will appear. This search screen functions like the other search screens available in InnoVia™. Select criteria for your Hotsheet search, then click on "Search".

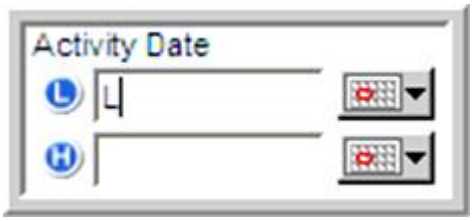


Tip: When searching by Activity date, you can either enter a date range, or do a "T-minus" search (Today minus X-number of days).



Example: If you only want to search for New, Residential listings, entered over the past 3 days, select property type Residential, status of New and enter "T-3" in the activity date "L" field.

Tip: To search for all hotsheet activity that has occurred since the last time you did a hotsheet search, place an "L" in the low activity date field.



Your search results will be displayed in the standard one-liner format. A full display can be viewed by clicking the MLS number. Or, if you clicked “Printer Friendly” on the Matches Found box, you can change all of the listings to any available display choices and browse through them by scrolling. If you want to filter out certain listings, or email listings, use the “Used Checked” function.

Residential / New

SEL	ST	MLS	PT	Address	City	BR	BA	HB	Subdiv	AC SqFt	Tot SqFt	Yr. Built	List $	LO/LA	
☐	N	606527	R	2350 FIRESTONE DR	Punta Gorda	2	1	0	Harbour Heights	768	1032	1958	$109,000	FLRE00	304368
☐	N	606691	R	6581 HONU CT	North Port	2	2	0	HOLIDAY PARK UNIT 2	1152	2212	1974	$109,000	AWRD	539386
☐	N	606591	R	21066 GEPHART AVE	Port Charlotte	0	1	0	PORT CHARLOTTE	855	855	1961	$125,900	SRLL00	646541
☐	N	606552	R	12412 GREEN GULF BLVD	Punta Gorda	2	2	0	trop g a	1100	1959	1994	$134,500	ALMR	486585
☐	N	606507	R	2445 EDGEHILL TER	Port Charlotte	2	1	0	PORT CHARLOTTE SEC11	685	1170	1959	$134,900	SARASO	INGORVAIA
☐	N	606668	R	3259 EASY ST	Port Charlotte	2	1	0	None	768	1303	1959	$138,000	RNDL	307842
☐	N	606599	R	22238 LARAMORE AV	Port Charlotte	2	2	0	Port Charlotte	1120	1596	1963	$139,900	HRBR	532935
☐	N	606571	R	22153 BEVERLY	Port Charlotte	2	1	0	PORT CHARLOTTE	938	1180	1962	$144,900	SUNB	301856
☐	N	606581	R	53 E WINDMILL	Punta Gorda	2	1	1	wmv	1292	1892	2005	$149,900	SRLL00	301508
☐	N	606708	R	21155 N GLENDALE	Port Charlotte	2	1	0	PCH	851	1256	1960	$160,000	ARGI	80001
☐	N	606535	R	3054 W Tarrywood Terrace	Punta Gorda	2	2	0	Harbour Heights	1072	1634	1980	$164,900	SUNSTR	301741
☐	N	606564	R	22486 olean blvd.	Port Charlotte	2	2	0	port charlotte	1126	1793	1972	$174,900	REOV	510884

You will notice that the one-liners are divided by property type and status.

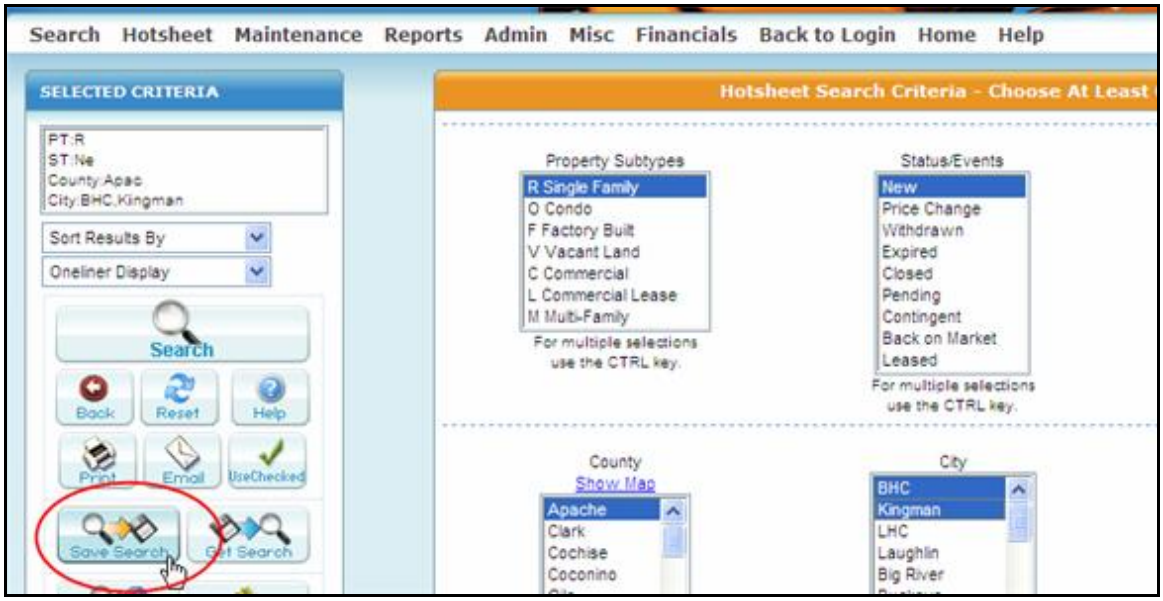
Status Codes

A – Active
B – Back on Market
M – Misc. change
K – Contingent
C – Closed
$ – Price change
P – Pending
D – Deleted
N – New
W – Withdrawn
X – Expired

InnoVia™ can automatically e-mail a Hotsheet to each of its users on a daily basis. This e-mail is sent as a link; when the link is clicked, you will see the standard one-liner display that lists the previous day’s activity on all property types. To receive this email daily, contact your local board office and provide them with your email address. Once the e-hotsheet is activated under your agent information, you will receive the electronic hotsheet every day.

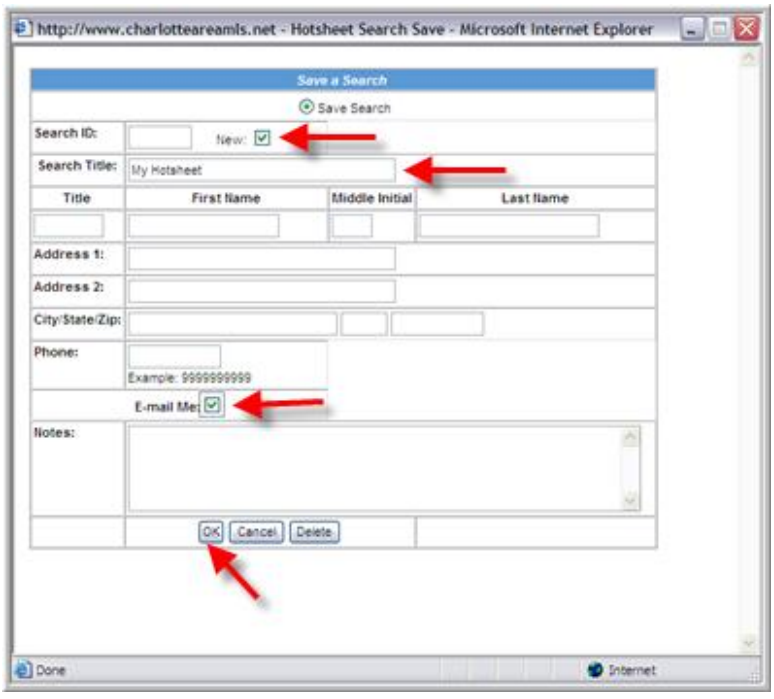
Saving a Hotsheet Search/ Set up e-Hotsheet

To save a hotsheet search or set up a custom e-hotsheet, do a Hotsheet search as outlined previously, but instead of hitting the "Search" button, click on "Save Search" located on the left side of the screen.



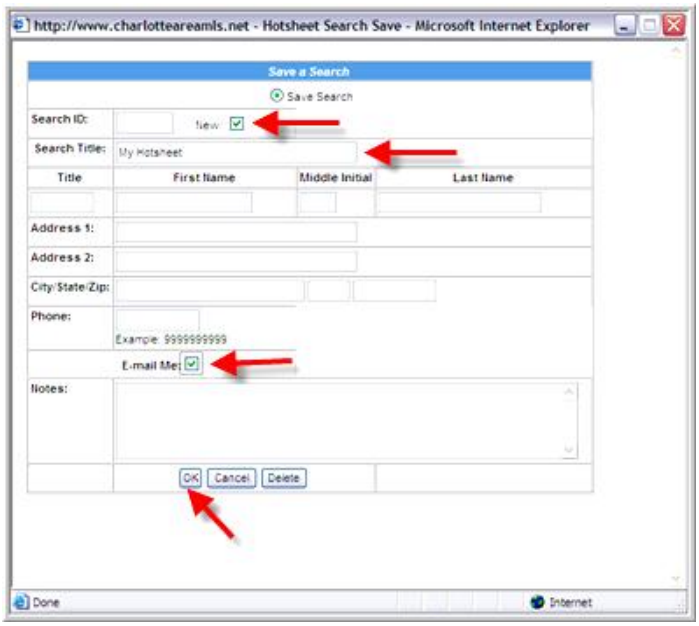
When the "Save Search" pop-up box appears, check the "New" box to tell the system that it should number your search.

Give your custom hotsheet a title in the "Search Title" field, then fill out any additional information as desired (though such information is not required).



To set up a custom e-hotsheet, click on "Email me" and the system will send you an email every night with the results of your saved hotsheet search.

Once you fill out the appropriate fields, click "OK". The search will be saved, and if you selected the "E-mail Me" option, the first email will be sent to you the next day.



You can retrieve the saved search by accessing the search screen and clicking on the "Get Search" button. Once the "Get Search" window appears, use the drop down menu to select the saved search you wish to view. Click the "OK" button and the search screen will then be populated with the saved criteria.

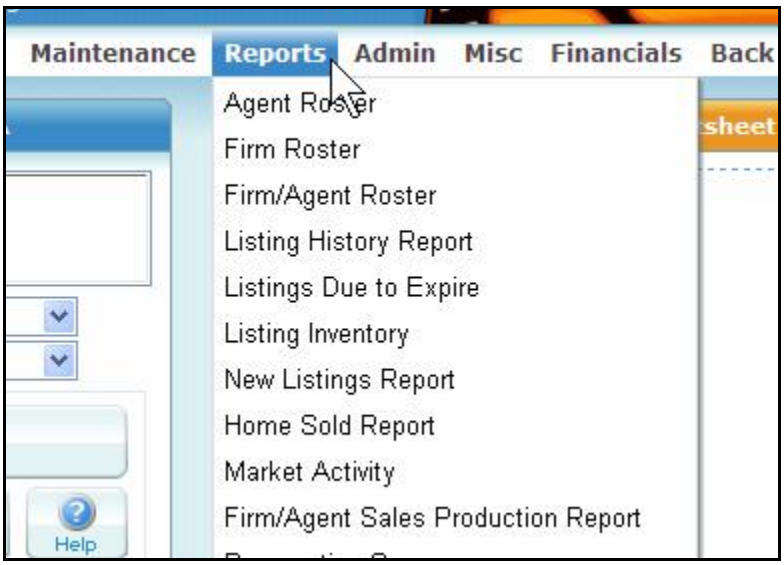
You can perform a search by clicking on "Search", or you can edit the information by either adding criteria (as you would if performing a search) or removing criteria. To save any changes made to the saved hotsheet search, just click on the "Save" button and the set-up page will be displayed. Here you can change contact information if needed. When you are done, click "OK" and the changes will be saved.

Reports

You can view a variety of reports by clicking the “Reports” tab on the InnoVia™ navigation bar. A menu will appear, allowing you to select the desired report.

When accessing the reports, you will see that a search screen appears. These search screens work the same as all of the other search screens in InnoVia™.

Here is an overview of the available reports:



Firm/Agent Roster: This report displays a list of agents within the selected Firm (or Firms). The one-liner display contains various information about each agent. By clicking on the agent ID link, the Agent information sheet (Agent Display) will be displayed. Clicking on the email link allows you to email a particular agent.

Firm Roster: This report provides a list of the firms within the InnoVia™ database. Search for firms by name, type, or ID. The results will display contact information for each firm found, based on your search criteria.

Agent Roster: This report will display a list of agents within the InnoVia™ database. Search for agents by first or last name, type, or ID. The results will display contact information for each agent found, based on your search criteria.

Listing History Report: This report enables you to look up the history of MLS property listings. You can find out when a listing was entered, had a price change, went pending, etc. Searches done by MLS# will give the history of that particular *listing*. Searches done by address or unique property identification number will give listings history for that *property*.

Home Sold Report: This report provides statistical information for residential listings sales. Additionally, this report can access the data for a single zone/area

or default to all areas, based on the selected criteria. Information is provided by price range, numbers of bedrooms, days on market and how sold code.

Market Activity Report: This report shows several types of listing activity statistics for a selected Agent or Firm within a given time frame for any type of property. Additionally, this report can access the data for a single zone/area or default to all areas, based on the selected criteria. This report is essentially a detailed "market share" analysis that reports numbers and percentages for selected firms and/or agents as compared to the Board as a whole.

Firm/Agent Inventory Report: This report is a specialized search that lists property inventory for a Firm or an agent within a selected firm.

Listings Due to Expire Report: This report provides access to listings based on the date they are due to expire. This is a security protected report – the system will only allow access to information based on your defined security level. For example, if you are assigned agent level security, you will only have access to listings assigned to you when using this report. Those with broker level security will have access to expiration dates for all listings assigned to agents within his/her firm.

New Listings Report: This report provides information on all the new listings in your area over a given time frame.

Agent Sales Report: An Agent Sales Report with the parameters of a time range and an agent ID will show all of the listings either listed or sold by the agent over the selected time period. The listings will be separated into three categories – "Listed", "Sold", and "Listed and Sold". Properties in the "Listed" category were listed by the agent and sold by someone else. "Sold" listings were listed by someone else, and sold by the agent. "Listed and Sold" listings were listed **and** sold by the given agent.

InnoVia™ is a customized system, meaning it is designed based on specifications supplied by your local board office. Due to this fact, your reports may have some variation, you may have reports that are not covered in this section, or you may be missing some that are covered. If you have questions regarding the availability of various reports, contact your local board office.

Agent Market Share Report: This report provides agent rankings based on input selected and given time range. If a firm is selected, agents will be ranked among other agents in that firm. If no firm is selected, agents will be ranked according to their standing in the entire Board. This report also provides the market share for each agent listed in the results

Firm Market Share: This report provides firm rankings based on input selected and given time range. If a firm is selected on the search screen, it will be the only firm for which results will be displayed. If no firm is selected, firms are ranked according to their standing in the entire Board. This report also provides the market share for each firm listed in the results.

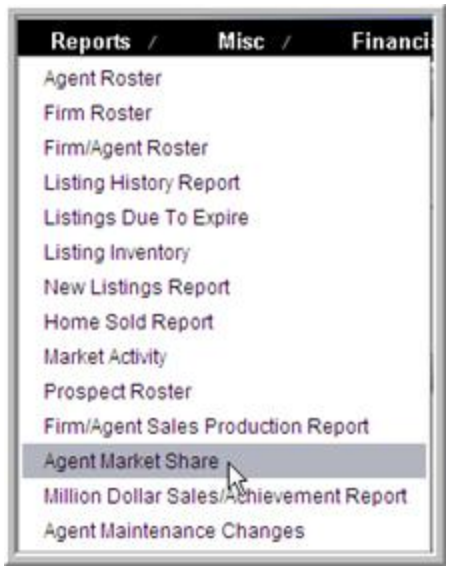
Million Dollar/Sales Achievement Report: This report provides a sales summary for the selected agent over a specified time period. It shows a brief description of each sale with List/Sell Agent, Sell Date and Price, and the Claimed Credit by the agent for each sale. It also totals the transactions and Claimed Credit over the time period specified.

InnoVia™ is a customized system, meaning it is designed based on specifications supplied by your local board office. Due to this fact, you may have reports that are not covered in this section, or you may be missing some that are covered. If you have questions regarding the availability of various reports, contact your local board office.

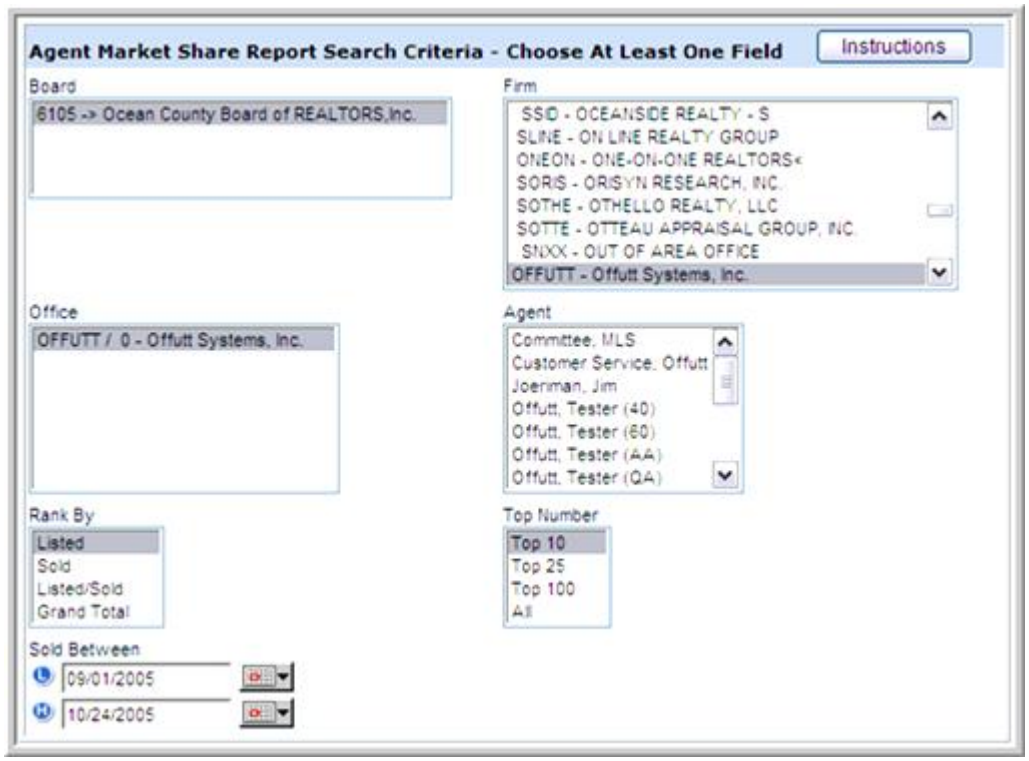
Agent Market Share Report

This report was implemented in response to numerous requests for reports that would "rank" agents according to sales statistics.

To begin an Agent Market Share Report, go to "Reports" and click on "Agent Market Share".



You will see the following input screen (or a similar one):



Select your firm to only get statistics for agents in your firm.

To rank agents in selected firms, hold down the "Ctrl" key on your keyboard while selecting desired firms.

To rank all agents in the MLS, do not make a selection in the "Firm" field.

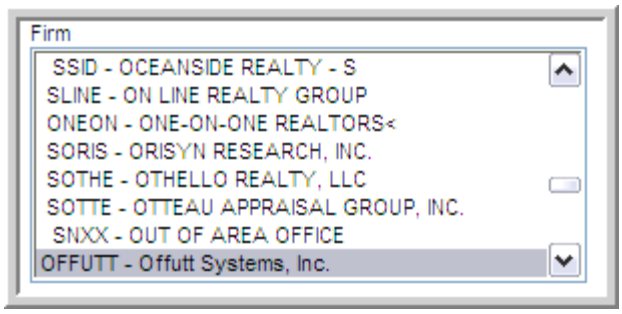
Select particular agents in the "Agent" field. If your firm has more than one office, select the desired office in the "Office" field.

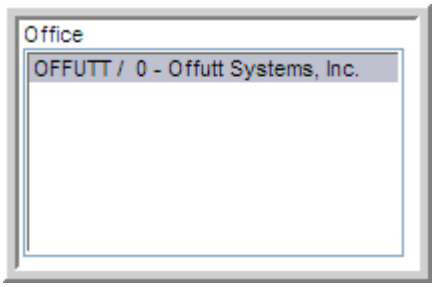
Select the "Rank By" (this field is explained on the following page).

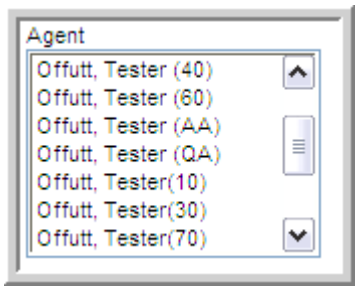
The "Top Number" tells the system how many agents to rank.

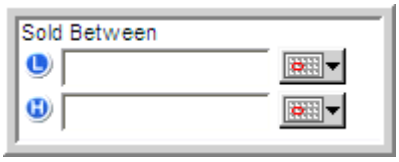
Input a time frame.

Once you have the parameters of your report selected, click "Search".


Firm
SSID - OCEANSIDE REALTY - S
SLINE - ON LINE REALTY GROUP
ONEON - ONE-ON-ONE REALTORS<
SORIS - ORISYN RESEARCH, INC.
SOTHE - OTHELLO REALTY, LLC
SOTTE - OTTEAU APPRAISAL GROUP, INC.
SNXX - OUT OF AREA OFFICE
OFFUTT - Offutt Systems, Inc.







The "Rank By" selections can be explained as follows:

Rank by Listed: This report ranks agents by the following:

- all sales that occurred during the specified time frame
- which agent had the largest number of transactions for which they were on the LISTING SIDE ONLY. In this report type, if Agent A is ranked number one, then Agent A was on the LISTING SIDE ONLY of more transactions than any other agent during the timeframe given. (Agent A listed them; another agent sold them).

Rank by Sold: This report type ranks agents by the following:

- all sales that occurred during the specified time frame
- which agent had the largest number of transactions for which they were on the SELLING SIDE ONLY. In this report type, if Agent A is ranked number one, then Agent A was on the SELLING SIDE ONLY of more transactions than any other agent during the timeframe given. (Agent A sold them; another agent listed them).

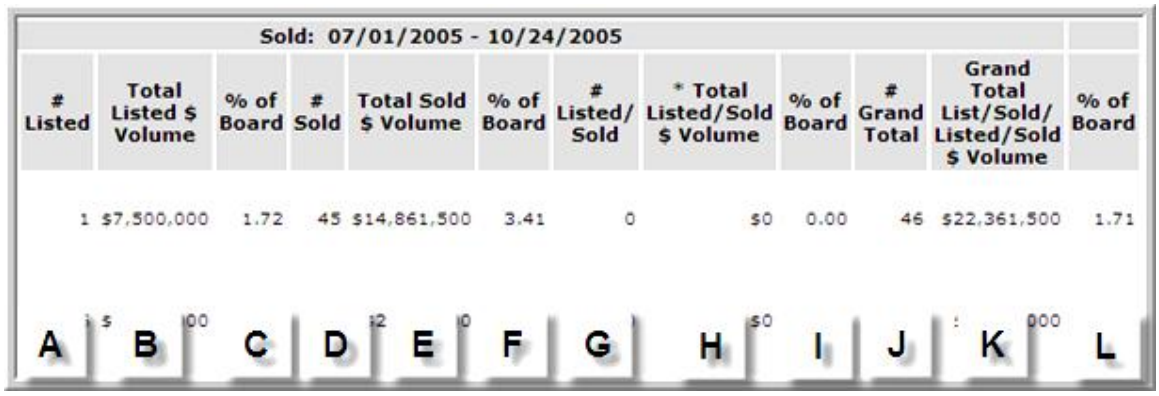
Rank by Listed/Sold: This report type ranks agents by the following:

- all sales that occurred during the specified time frame
- which agent had the largest number of transactions for which they were on the BOTH the listing side AND the selling side. In this report type, if Agent A is ranked number one, then Agent A was on the listing AND selling side of more transactions than any other agent during the timeframe given. (Agent A listed them; Agent A sold them).

Rank by Grand Total: This report type ranks agents by the following:

- all sales that occurred during the specified time frame
- which agent had the largest number of transactions for which they were on EITHER the listing side OR the selling side OR BOTH. In this report type, if Agent A is ranked number one, then Agent A was on EITHER the selling or listing sides of more transactions than any other agent during the timeframe given.

When the Report appears, the information shown below will be provided. *The agent name and ranking will be on the far left (not shown).*



Sold: 07/01/2005 - 10/24/2005

# Listed	Total Listed $ Volume	% of Board	# Sold	Total Sold $ Volume	% of Board	# Listed/ Sold	* Total Listed/Sold $ Volume	% of Board	# Grand Total	Grand Total List/Sold/ Listed/Sold $ Volume	% of Board
1	$7,500,000	1.72	45	$14,861,500	3.41	0	$0	0.00	46	$22,361,500	1.71

A B C D E F G H I J K L

A. **# Listed:** The number of closed listings during the timeframe given where this agent was the listing agent but NOT the selling agent.

B. **Total Listed $ Volume:** Selling price total for all listings mentioned in A.

C. **% Of Board:** The agent's percentage of the Board's Total Listed Volume.

D. **# Sold:** The number of closed listings during the timeframe given where this agent was the selling agent but NOT the listing agent.

E. **Total Sold $ Volume:** Selling price total for all listings mentioned in D.

F. **% Of Board:** The agent's percentage of the Board's Total Sold Volume.

G. **# Listed/Sold:** The number of closed listings during the timeframe given where this agent was both the listing agent AND the selling agent.

H. **Total Listed/Sold $ Volume:** Selling price total for all listings mentioned in G. **This number is double the actual selling price total, to reflect the fact that the agent in question gets double credit for being both the listing agent and the selling agent.**

I. **% Of Board:** The agent's percentage of the Board's Total Listed/Sold Volume.

J. **Grand Total:** The number of closed listings during the timeframe given where the agent in question was EITHER the listing agent, the selling agent, or both.

K. **Grand Total Listed/Sold/Listed/Sold $ Volume:** Selling price total for all listings mentioned in J.

L. **% Of Board:** The agent's percentage of the Board's Grand Total Volume.

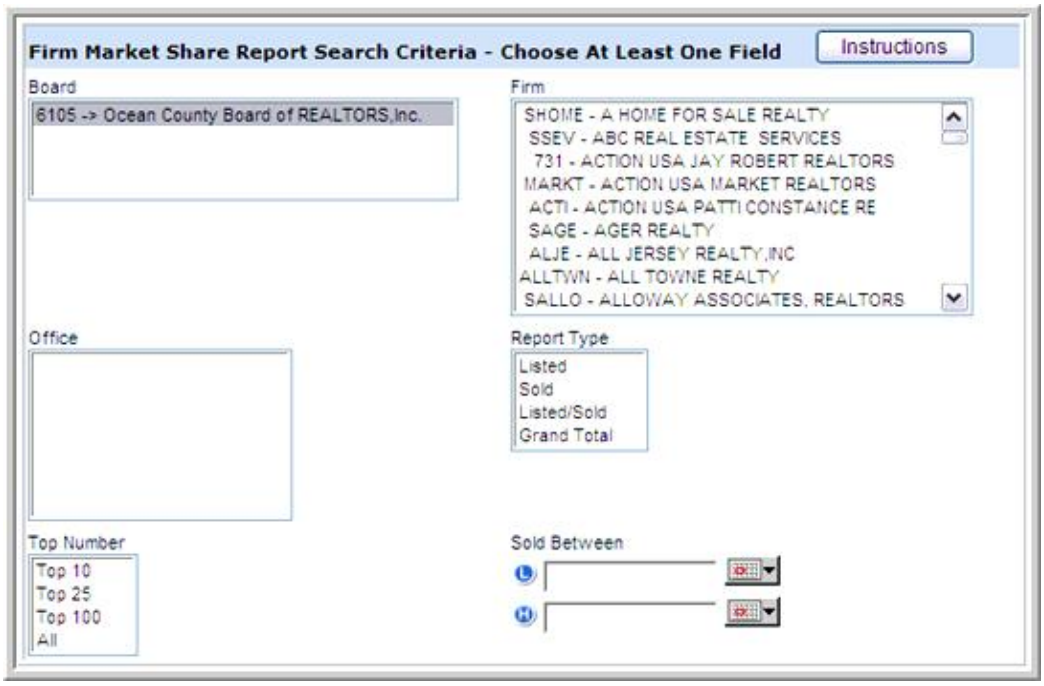
Firm Market Share

Explaining the Firm Market Share Report

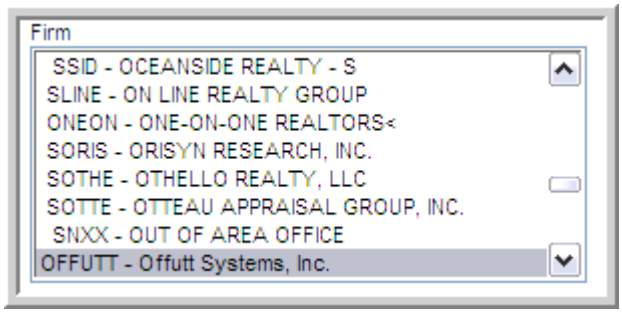
This report was implemented in response to numerous requests for reports that would "rank" firms according to sales statistics.

To begin a Firm Market Share Report, click on "Reports" and select "Firm Market Share".

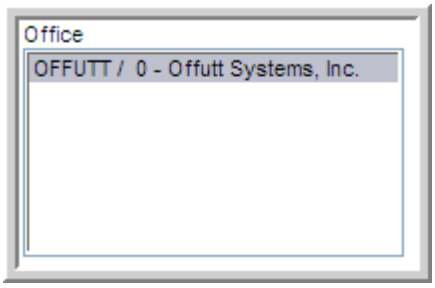
You will then see the input screen shown below (or one similar to it):



Select your firm to only get statistics for your firm.


Firm
SSID - OCEANSIDE REALTY - S
SLINE - ON LINE REALTY GROUP
ONEON - ONE-ON-ONE REALTORS<
SORIS - ORISYN RESEARCH, INC.
SOTHE - OTHELLO REALTY, LLC
SOTTE - OTTEAU APPRAISAL GROUP, INC.
SNXX - OUT OF AREA OFFICE
OFFUTT - Offutt Systems, Inc.

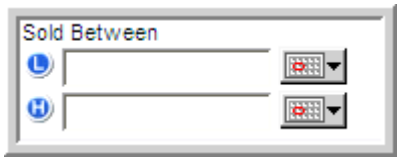
To rank a selected number of firms, hold down the "Ctrl" key on your keyboard while selecting desired firms.



To rank all firms, do not make a selection in the "Firm" field.

Select the "Rank By" (this field is explained on the following page).

Input a time frame.



Once you have the parameters of your report selected, click "Search".

The "Rank By" selections can be explained as follows:

Rank by Listed: This report ranks firms by the following:

- all sales that occurred during the specified time frame
- which firm had the largest number of transactions for which they were on the LISTING SIDE ONLY. In this report type, if Firm A is ranked number one, then Firm A was on the LISTING SIDE ONLY of more transactions than any other firm during the timeframe given. (Firm A listed them; another firm sold them).

Rank by Sold: This report type ranks firms by the following:

- all sales that occurred during the specified time frame
- which firm had the largest number of transactions for which they were on the SELLING SIDE ONLY. In this report type, if Firm A is ranked number one, then Firm A was on the SELLING SIDE ONLY of more transactions than any other firm during the timeframe given. (Firm A sold them; another firm listed them).

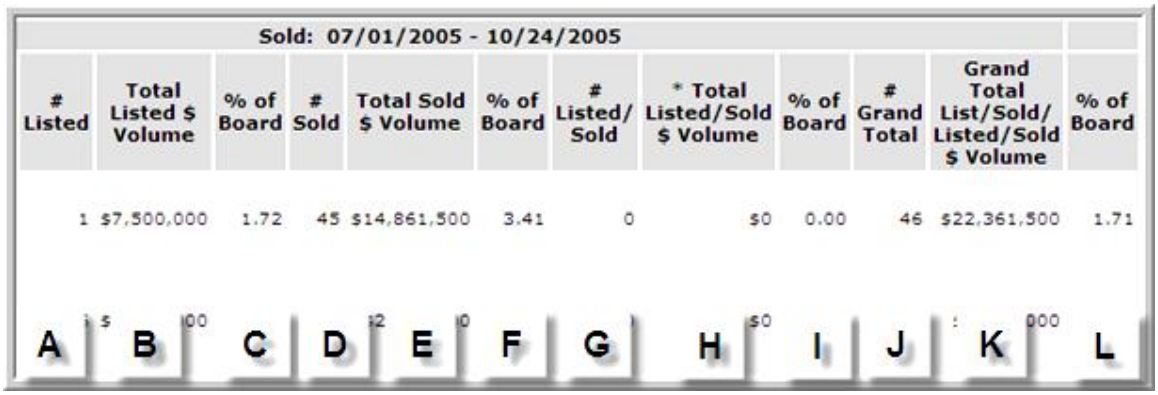
Rank by Listed/Sold: This report type ranks firms by the following:

- all sales that occurred during the specified time frame
- which firm had the largest number of transactions for which they were on the BOTH the listing side AND the selling side. In this report type, if Firm A is ranked number one, then Firm A was on the listing AND selling side of more transactions than any other firm during the timeframe given. (Firm A listed them; Firm A sold them).

Rank by Grand Total: This report type ranks firms by the following:

- all sales that occurred during the specified time frame
- which firm had the largest number of transactions for which they were on EITHER the listing side OR the selling side OR BOTH. In this report type, if Firm A is ranked number one, then Firm A was on EITHER the selling or listing sides of more transactions than any other firm during the timeframe given.

When the Report appears, the following information will be provided. *The firm name and rank will be on the far left (not shown)*.



Sold: 07/01/2005 - 10/24/2005

# Listed	Total Listed $ Volume	% of Board	# Sold	Total Sold $ Volume	% of Board	# Listed/ Sold	* Total Listed/Sold $ Volume	% of Board	# Grand Total	Grand Total List/Sold/ Listed/Sold $ Volume	% of Board
1	$7,500,000	1.72	45	$14,861,500	3.41	0	$0	0.00	46	$22,361,500	1.71

A B C D E F G H I J K L

A. **# Listed:** The number of closed listings during the timeframe given where this firm was the listing firm but NOT the selling firm.

B. **Total Listed $ Volume:** Selling price total for all listings mentioned in A.

C. **% Of Board:** The firm's percentage of the Board's Total Listed Volume.

D. **# Sold:** The number of closed listings during the timeframe given where this firm was the selling firm but NOT the listing firm.

E. **Total Sold $ Volume:** Selling price total for all listings mentioned in D.

F. **% Of Board:** The firm's percentage of the Board's Total Sold Volume.

G. **# Listed/Sold:** The number of closed listings during the timeframe given where this firm was both the listing firm AND the selling firm.

H. **Total Listed/Sold $ Volume:** Selling price total for all listings mentioned in G. **This number is double the actual selling price total, to reflect the fact that the firm in question gets double credit for being both the listing firm and the selling firm.**

I. **% Of Board:** The firm's percentage of the Board's Total Listed/Sold Volume.

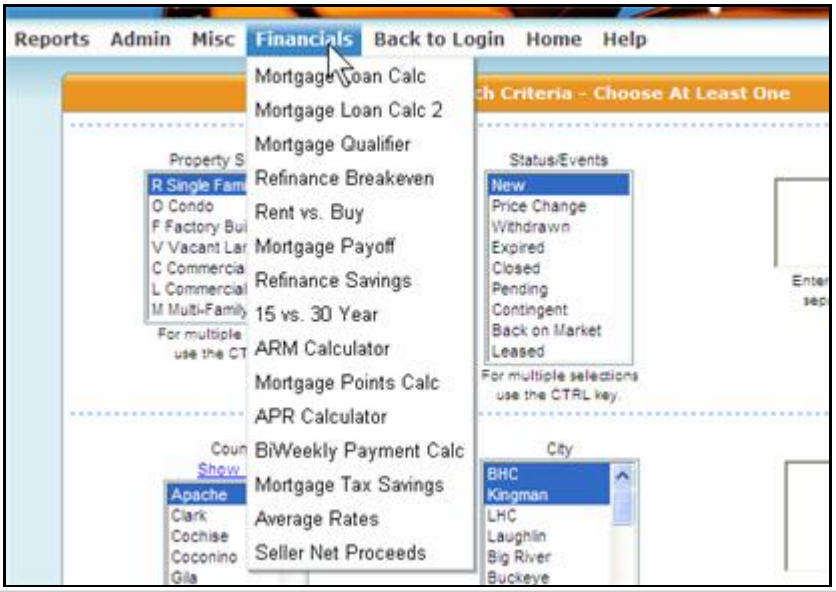
J. **Grand Total:** The number of closed listings during the timeframe given where the firm in question was EITHER the listing firm, the selling firm, or both.

K. **Grand Total Listed/Sold/Listed/Sold $ Volume:** Selling price total for all listings mentioned in J.

L. **% Of Board:** The firm's percentage of the Board's Grand Total Volume.

Financials

InnoVia™ offers links to various financial functions by accessing the **Financials** tab on the InnoVia navigation bar.



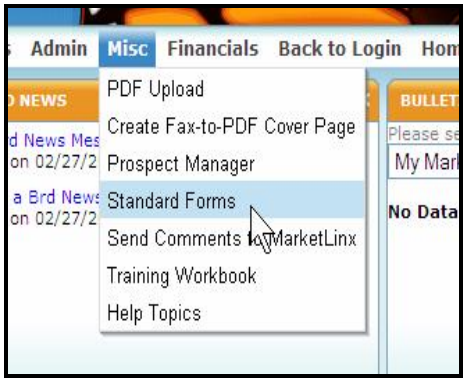
When you select one of the above options from the drop down list, you are linked to a form that allows you to create a report based on information you supply.

You can print any of the reports by using the print option located on your browser navigation bar. Because you are linked out to another web site, you are unable to email any information from this area of the InnoVia™ system.

Tip: To print a report under Mortgage Calculator, you will need to click on "Create a Printable Report". This option is located at the very bottom of the Mortgage Calculator input screen.

Standard Forms

InnoVia™ MLS System maintains a library of useful forms, which may be accessed under the **Misc** tab by clicking on “Standard Forms”. The forms can also be accessed with the “Standard Forms” icon on the “My InnoVia™ Page”.



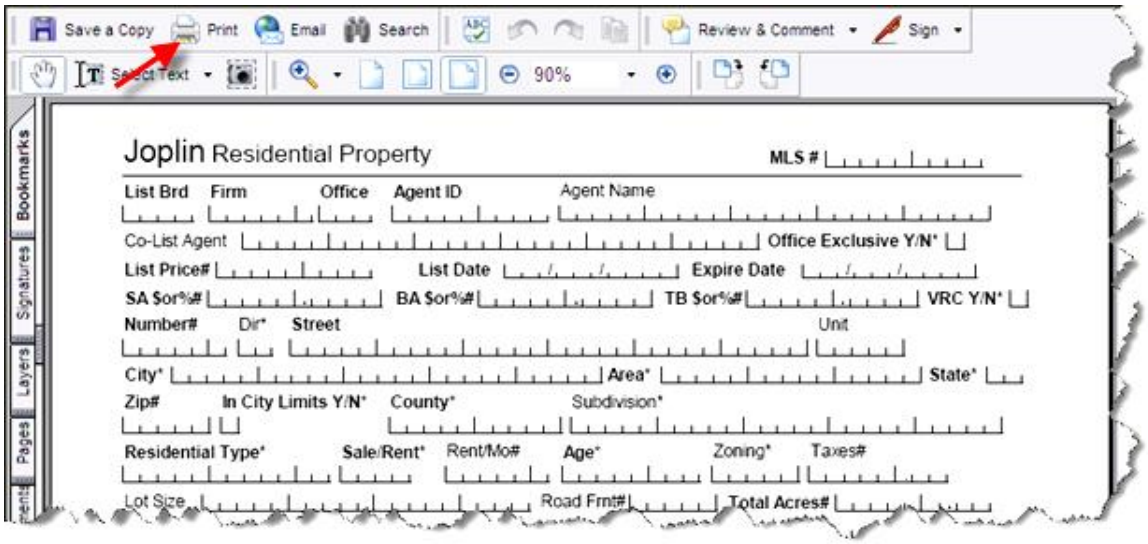
Forms are only available in PDF format. To view a PDF file, the user will need Adobe Systems Inc.’s Acrobat Reader, which is free and can be easily downloaded from the Adobe website, www.adobe.com.

Note: Some of the recent browser versions have Acrobat Reader pre-loaded.

Once you access the FTP site, you may find it easier to read the file names by changing your display to DETAILS mode. To access DETAILS mode, place your cursor in the forms window (e.g. the same window with the forms icons) and click the right mouse button, after the icons for each individual form file appear. You may be warned that, "Running a system command on this item might be unsafe". If so, click Yes.

A sub menu then appears with several choices. Choose VIEW, and then DETAILS. A sizable column list of each individual form file will then be displayed.

After selecting a form, it will be displayed on the main InnoVia™ screen.



Note: To print, DO NOT use the main print button on your browser navigation bar. Click on the Acrobat print button to print the displayed form.

Listing Maintenance

The Listing Maintenance function available in InnoVia™ will allow you to add new listings and modify information in existing listings. Depending on your system design, **Listing Maintenance** is accessed either by clicking the **Maintenance** tab from the navigation bar or by choosing **Listing Maintenance** under the **Misc** tab.

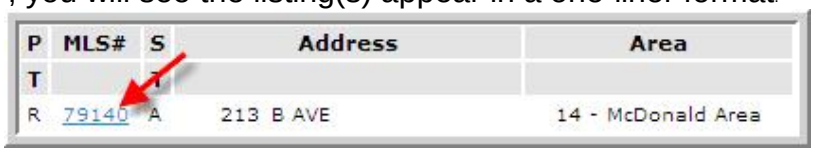
By accessing the Listing Maintenance option, a search screen will appear. This screen functions much like other search screens in InnoVia™, with one exception – this area of the system is security-protected. This means you will only have access to your own listings (or if you are a broker, your firm's listings).

Modify Existing Listings

To modify an existing listing, enter the search criteria to locate the listing in your inventory, then click "Search".

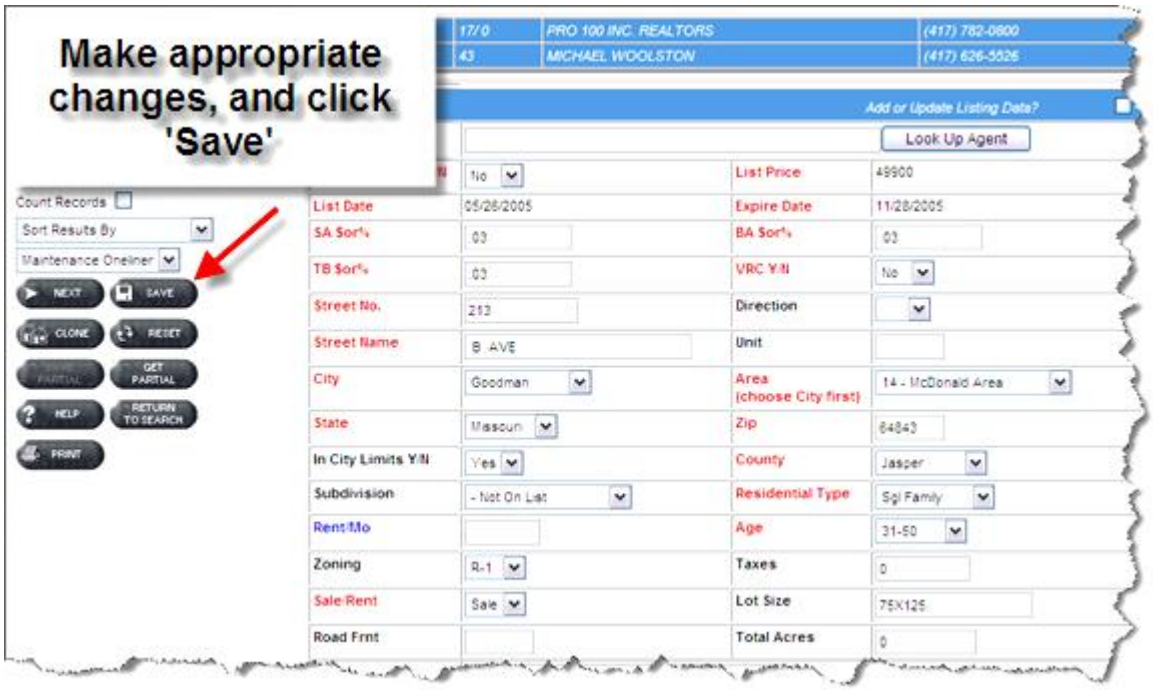
Once you click "Search", you will see the listing(s) appear in a one-liner format.

Click on the MLS number from the one-liner and you will be taken to the maintenance form for that listing.



Note: Please be aware that your Association has specific rules regarding types of changes that can be made to listings that are of certain statuses (for example,

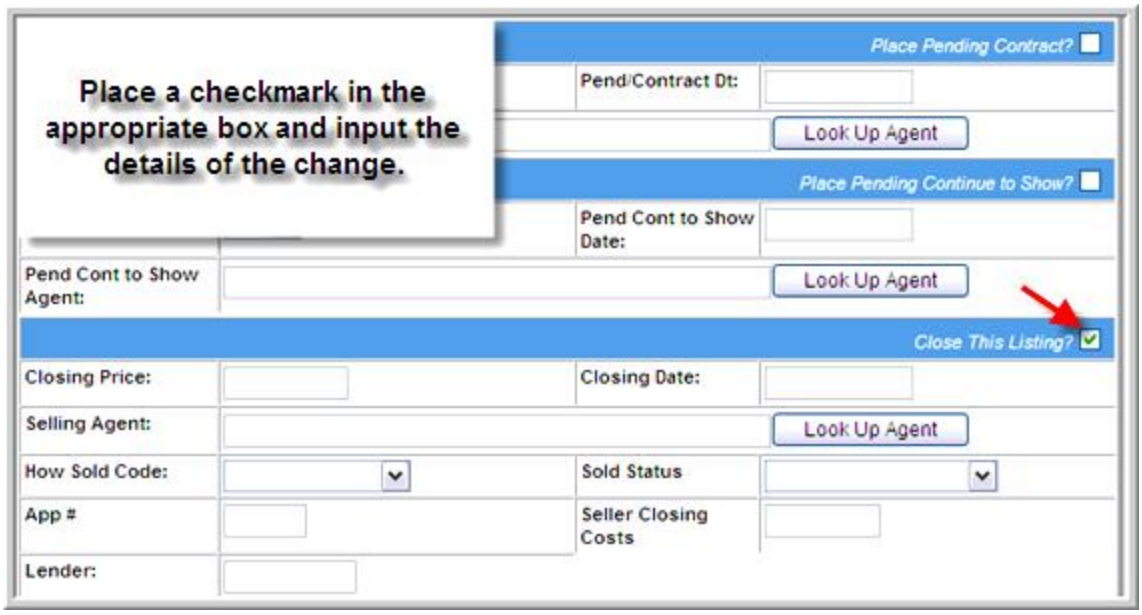
some associations do not allow expiration date extensions to be made to Pending listings). If you try to make some of the changes below, and have problems, or encounter error messages, contact your Board Office to inquire about the rules that are in place for your MLS.



Once you have saved your change(s), a screen will appear informing you that the Update was successful. From here, **CLICK ON "CONTINUE"** if you wish to continue performing maintenance on other listings.

TIP: If you need to print a display of the listing for record keeping purposes, click on Full display, print the display, then click "Back" (located on your browser navigation bar). Next, click on the "Continue" button to continue performing maintenance on other listings.

When making **significant changes** to the listing (changing the listing price, closing the listing, placing the listing under pending contract, etc.), scroll to the bottom of the maintenance form.



Change a Listing Price

Find the section labeled “Change Listing Price” on the maintenance form for the listing on which you wish to change the price.

Click the checkbox located next to “Change Listing Price”. Enter the new price and click “Save”.

As noted earlier in this section, click “Continue” if you wish to continue doing maintenance on other listings.

Extend a Listing’s Contract

Find the section labeled “Extend Listing Contract” on the maintenance form for the listing on which you wish to extend the listing contract.

Click the checkbox located next to “Extend Listing Contract”. If you do not place a check in the appropriate box, the system will not allow you to enter the new expiration date.

Once you have checked the appropriate box and entered the new contract date, click “Save” and the new date will be applied to the listing.

Place a Contingency Contract

Find the section labeled “Place Contingency Contract” on the maintenance form for the listing on which you wish to place a contingency contract.

Click the checkbox located next to “Place Contingency Contract”.

Enter the contract date, click “Save”, and the listing’s status will be changed to “K” for Contingent. (Some MLS associations elect not to have a Contingent status, so if this capability does not exist for you, contact your Board Office to ask how to note on the listing that it is contingent.)

Place a Pending Contract

Find the section labeled “Place Pending Contract” on the maintenance form for the listing on which you wish to place a pending contract.

Click the checkbox located next to “Place Pending Contract”.

Enter the date, click “Save”, and the listing’s status will be changed to Pending.

Close a Listing

Find the section labeled “Close This Listing” on the maintenance form for the listing you wish to close.

Click the checkbox located next to “Close This Listing”.

Before closing a listing, you may be required to enter certain information. (The mandatory items for closing a listing are dictated by your local board office).

Once you have entered all necessary closing information, click “Save” and the listing’s status will be changed to Closed.

Lease a Listing

Find the section labeled “Lease This Listing” on the maintenance form for the listing you wish to lease.

Click the checkbox located next to “Lease This Listing”.

Enter the lease date and click “Save”.

Withdraw a Listing

Find the section labeled “Withdraw Listing From Market” on the maintenance form for the listing you wish to withdraw.

Click the checkbox located next to “Withdraw Listing From Market”.

Enter the withdrawn date and click “Save”.

Restore a Listing to Active

Find the section labeled “Restore Listing to Active” on the maintenance form for the listing you wish to restore to Active status.

Click the checkbox located next to “Restore Listing to Active”.

Enter the back on market date and click “Save”.

Now that the listing has an Active status, you can make any additional changes that are needed, including returning it to it’s previous status.

Note: Please be aware that your Association has specific rules regarding types of changes that can be made to listings that are of certain statuses (for example, some associations do not allow expiration date extensions to be made to Pending listings). If you try to make some of the changes above, and have problems, or encounter error messages, contact your board Office to inquire about the rules that are set up for your MLS. It may be necessary to restore the listing to an Active status before changes can be made.

Adding a New Listing

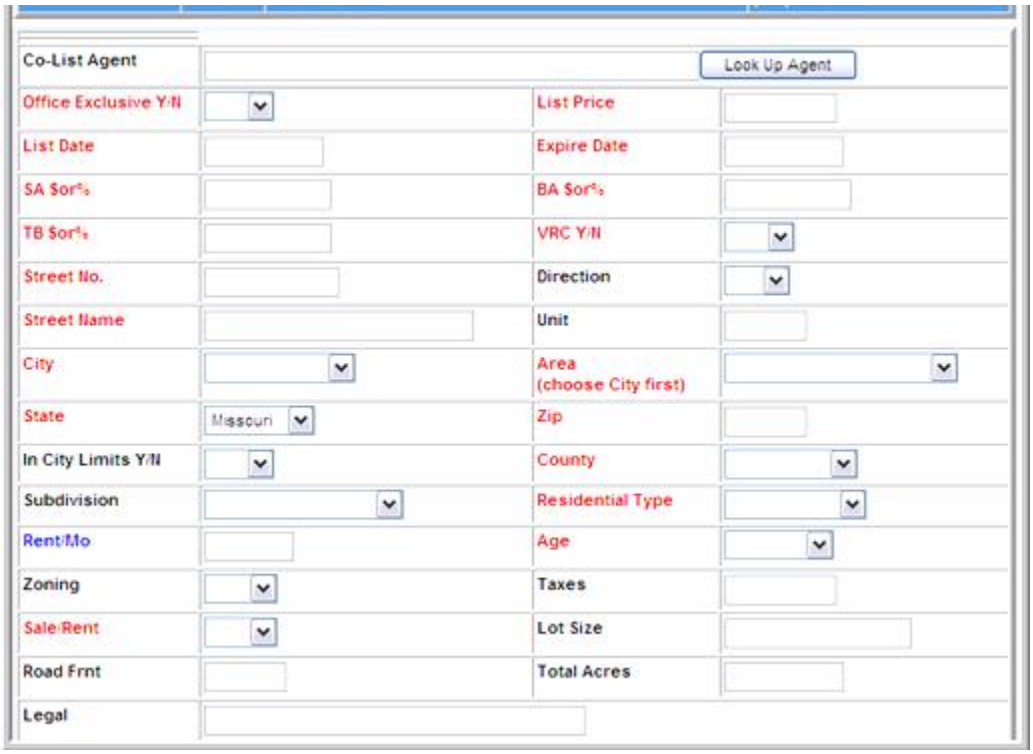
To add a new listing to the system, go to the listing maintenance search screen and click on the "Add New" button.

The next screen that appears requires you to select a List Agent from the drop down list. As noted earlier in this section, this menu displays options based on your User ID. This means that in most cases the only name available in the drop down list is your own, unless you have Broker-level access or higher, in which case the list would show the names of all agents affiliated with your office or firm.

Select list agent, select property type, and click "Continue".

Next you will see the maintenance form appear. *The maintenance form will contain different information based on the property type selected.*

InnoVia™ is a customized system. The maintenance form shown on the following page is for example purposes only; the input options shown may differ from what is available on your particular site.



The items displayed in **red font** are **mandatory**. This means all the mandatory fields must be filled in before you can save the listing.

The items in **black font** are **optional**. You only have to enter information in these fields if they are applicable.

The items in **blue font** are **conditionally mandatory**. This means that the field may be mandatory depending on what you have selected in another field. For example, if you were to select “Yes” in the “Lockbox Y/N” field, selecting something under “Lockbox Location” would then be mandatory.

Whether or not an item is mandatory, optional, or conditionally mandatory is determined by your board or association office.

To enter coded feature information, click on the “Coded Features” button located on the maintenance form. You will be presented with all the available coded features on one screen. To select any of these features, click in the box located next to the desired coded feature. Click “Accept” at the top or bottom of the Coded Features screen when you’ve selected all options.

Once you have completed entering all the necessary information, click “Save” and the listing will be saved to the database and you will be provided with a new MLS number, assigned automatically by the system.

The maintenance form, for the most part, consists of choice lists and entry fields.

To select an entry from a choice list, simply click on the item you wish to select. Some of these lists may require you to scroll down to select a certain item.

Tip: To avoid scrolling on choice lists, click anywhere in the box and press the key for the first letter of the item you wish to choose and the system will take you to the first item in the list that begins with the letter you pressed.

For Example: to select a subdivision named “Westend”, click anywhere on the subdivision choice list, press the “W” key on your keyboard, then scroll down until you find “Westend”. This function only works on the first letter.

Get Tax Info (if available)

If you have already provided the Tax ID # for your new listing, you can click on the “Get Tax Info” button. This will auto populate other details found in the tax information of the listing.

Cloning Listings

Cloning allows you to copy information from an existing listing into a new listing. If a number of listings need to be entered, contain a lot of the same information, and are of the same property type, you can use the “Clone Listing” option.

Enter the first listing normally, as described in “Adding a New Listing”.

Once the information is entered and saved, go back to Listing Maintenance and search for the listing you just entered.

From the one-liner, click on the MLS number of the listing you wish to clone.

When the maintenance form appears, edit the information to fit the next listing’s description (**but do not change the price or expiration date at this time**).

When you have finished making changes, click the “Clone” button on the left side of the screen (**not the “Save” button**).

If the cloned listing has a different list price than the original listing, an opportunity to add the listing price of the cloned listing will appear **after** clicking on the “Clone” button. You can also change the expiration date at the same time.

The system will read the listing as a new entry and assign a new MLS number.

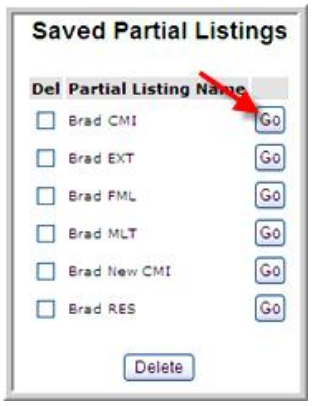
Saving a Partial Listing

If you get interrupted while adding a new listing, or discover that you do not have some of the required information, you may save the listing as a "partial". Listings saved as partials will not be given an MLS number and will not show on the hotsheet. At any point during adding a listing, if you wish to save the listing for later completion, click "Save Partial" on the left side of your screen. You will be prompted to name the listing. It is recommended that you name it as the address, so that there is no confusion when you go in later to complete the entry. Click "OK", and the partial listing will be saved.

At any point during adding a listing, if you wish to save the listing for later completion, click "Save Partial" on the left side of your screen.

Enter a name for your partial listing, then click "OK".

When you are ready to complete the partial listing, go to "Maintenance", then "Listings", and click on "Get Partial". A list of your partially entered listings will appear. Click "Go" next to the listing you wish to complete, and the listing maintenance form will appear with the saved information. Complete the listing, click "Save", and your listing will be entered into the MLS system.

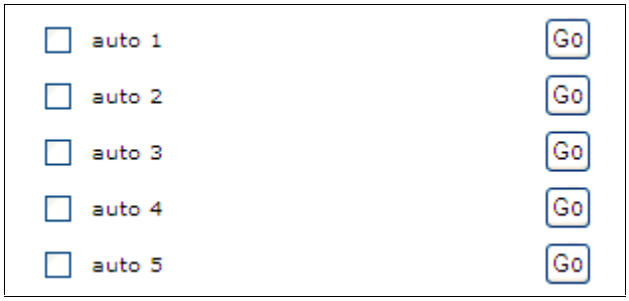


Partial Listing Auto-Save

InnoVia™ is also equipped with a function that will automatically save a partial listing for you, if you get logged out due to inactivity. The system will give the partial listing a name such as *auto 1*, *auto 2, auto 3*, etc. You can then go into Listing Maintenance, pull up the automatically saved partial listing, and finish and save it or save it under another name.

Note: InnoVia™ can only save one automatic partial listing per property type. For example: if there is already a partial residential listing named *auto 1*, and InnoVia™ tries to save another residential partial listing, it will give it the same name and overwrite the one that is already there. You may want to re-save these automatic partial listings under another name to avoid this situation.

Partial listings can only be automatically saved when getting logged out from inactivity. If you manually log out or you lose your internet connection, InnoVia™ cannot automatically save a partial listing. It's a good idea to manually "Save Partial" when inputting a listing, to make sure you don't lose your work.



Virtual Tours

How to add an icon to your listing that links to the Virtual Tour*:*

Contact a virtual tour company to locate the representative nearest to you. Schedule a session for a representative to record a tour of your property.

Once your tour has been recorded and placed online, you should receive notification from the company in the form of an email. The email will let you know what the URL for your tour is (where to go online to see the tour).

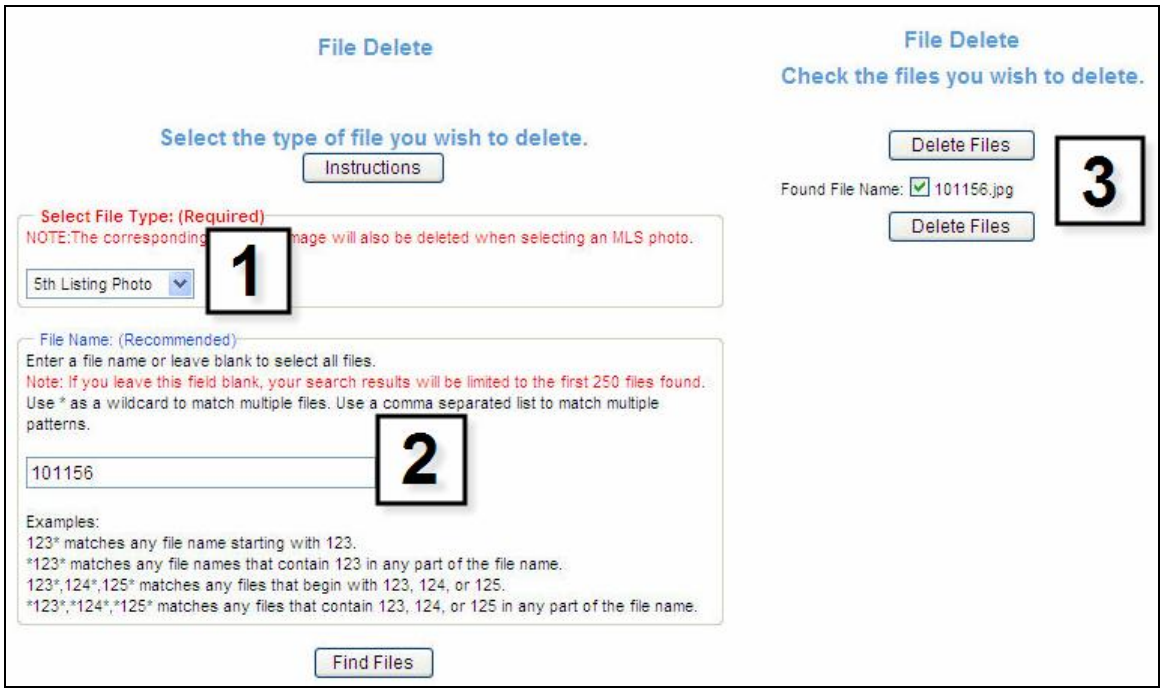
In InnoVia™, go to Listing Maintenance and change the Virtual Tour option to YES for that listing. Then, in the "Virtual Tour URL" field, type in or "paste" the URL provided in the email from the virtual tour company.

Once the listing is saved, you should see an ICON on your full display. When you click on the icon, it will link you to the tour. (The icon for your MLS may differ slightly in appearance and location from the one shown below. One common icon used is "VT").

Delete My Listings Files

Depending on your MLS, you may have the option to delete certain files from your listings in InnoVia. These may include listing photos and PDF documents that are attached to your listings.

To delete files from your listings, go to **“Maintenance”** and **“Delete My Listings Files”**.


File Delete
Select the type of file you wish to delete.
Instructions
Select File Type: (Required)
NOTE:The corresponding
mage will also be deleted when selecting an MLS photo.
5th Listing Photo
1
File Name: (Recommended)
Enter a file name or leave blank to select all files.
Note: If you leave this field blank, your search results will be limited to the first 250 files found.
Use * as a wildcard to match multiple files. Use a comma separated list to match multiple patterns.
101156
2
Examples:
123* matches any file name starting with 123.
123 matches any file names that contain 123 in any part of the file name.
123*,124*,125* matches any files that begin with 123, 124, or 125.
123,*124*,*125* matches any files that contain 123, 124, or 125 in any part of the file name.
Find Files
File Delete
Check the files you wish to delete.
Delete Files
Found File Name: 101156.jpg
Delete Files
3

1. From the drop-down list at the top, select the appropriate listing photo that you would like to delete.
   Note: In the drop-down list, 1st Listing Photo is the Main Property Photo (2nd Listing Photo is Subsequent Photo #1, 3rd Listing Photo is Subsequent Photo #2, etc.)

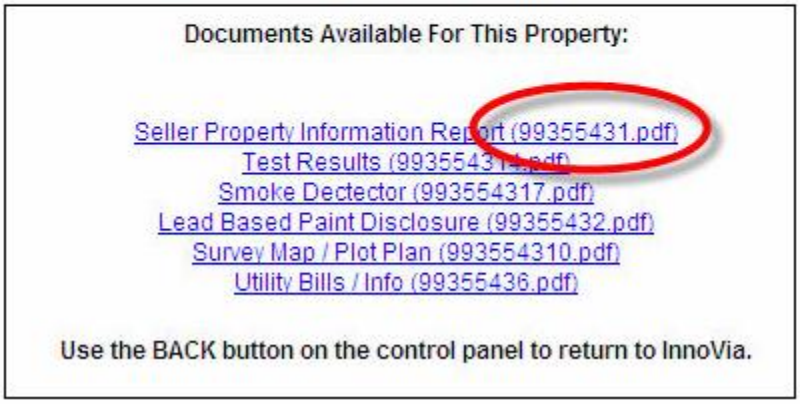
2. After you select the photo you wish to delete, type in the MLS# in the box under “File Name”. Click on “Find Files”.

3. If the file was found, it will be listed on the right-hand side of the screen. To delete the file, you must place a check mark in the box next to the file and click on "Delete Files"

Deleting PDF Documents

To delete a PDF document attached to a listing, you will follow the same basic instructions as when deleting a listing photo, with a few exceptions. Document PDF files are named MLS#1.pdf, MLS#2.pdf, MLS#3.pdf, etc. The number after the MLS number in the file name represents which attachment it is. For example, the Sellers Disclosure would be represented by the #1, and the Lead Based Paint Disclosure would be represented by the #2. So if you were working with MLS# 343566, the Sellers Disclosure file name would be 3435661.pdf, and the Lead Based Paint Disclosure would be 3435662.pdf. **The number is different for each MLS System**.

In order to determine which number represents which document, you will need to run a search for that listing. Once you run a search for that listing, go to the 'Full Display', and click on the 'Attachments' link to pull up all available documents. From the list of available documents, you will notice the file name in parentheses after the document title. Use this file name in 'Delete My Listing Files' to retrieve and delete this file.


Documents Available For This Property:
Seller Property Information Report (99355431.pdf)
Test Results (99355431[illegible].pdf)
Smoke Dectector (993554317.pdf)
Lead Based Paint Disclosure (99355432.pdf)
Survey Map / Plot Plan (993554310.pdf)
Utility Bills / Info (99355436.pdf)
Use the BACK button on the control panel to return to InnoVia.

Note: If your MLS system does not display the file name in parentheses, simply right-click the link to the document and select the "Properties" option, and the resulting window will display the file name of the document.

Note: If your MLS system has the newest version of the PDF upload function, you will be able to delete PDF attachments directly from the PDF Upload page.

Agent Maintenance/Modifying Contact Information

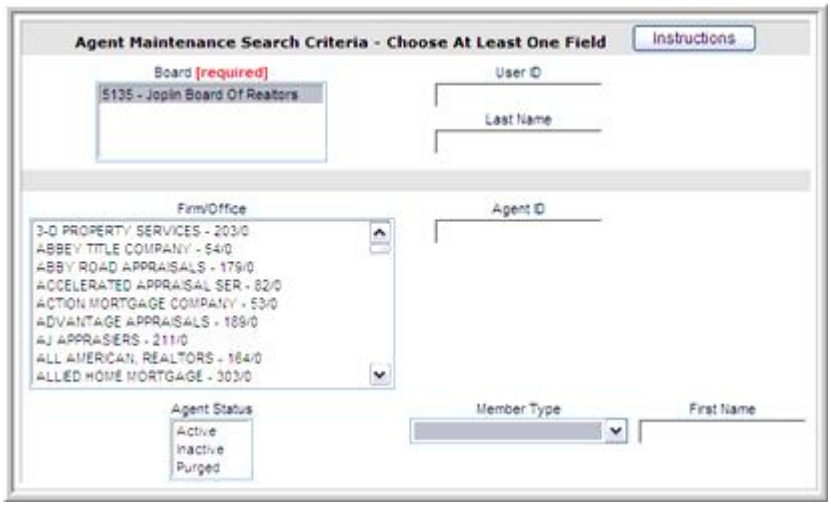
To change the information that displays on the Agent Display, or to change your password, click on “Maintenance”, then “Agent Maintenance” in InnoVia™.

Note: Some Boards require agents to call the Board Office to change passwords.

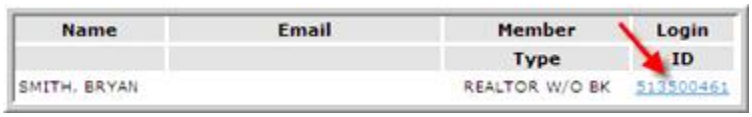
In order to modify an Agent’s information, you must first search for the Agent. This section of the system is security-driven, which means that brokers and administrative persons will be able to change the information of any agent in their firm, agents will only be able to change their own information, and the Board Office will be able to change anyone’s information.

Note: Some Boards require agents to call the Board Office to change information.

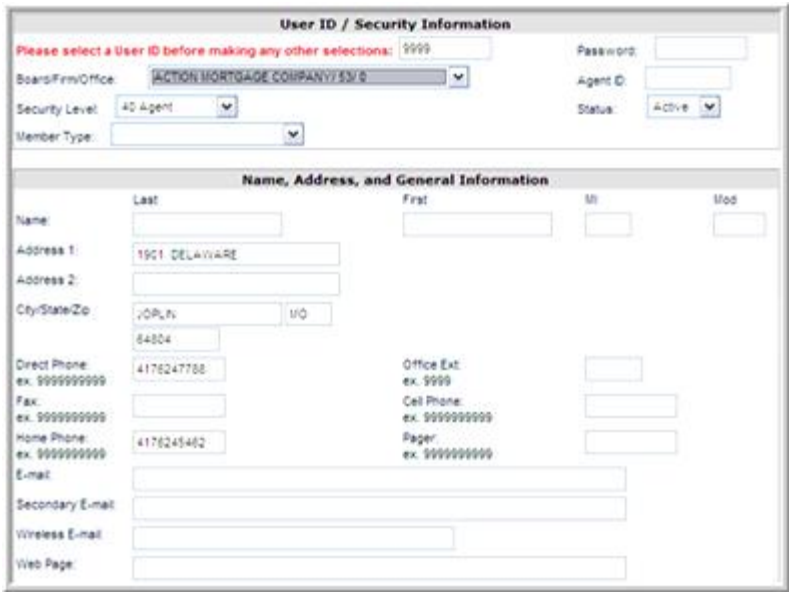
Enter the criteria to find the agent you wish to modify, then click “Search”.



Click on the “Login ID” of the agent you wish to modify.



From this point, change whatever information needs to be changed, then click "Save".

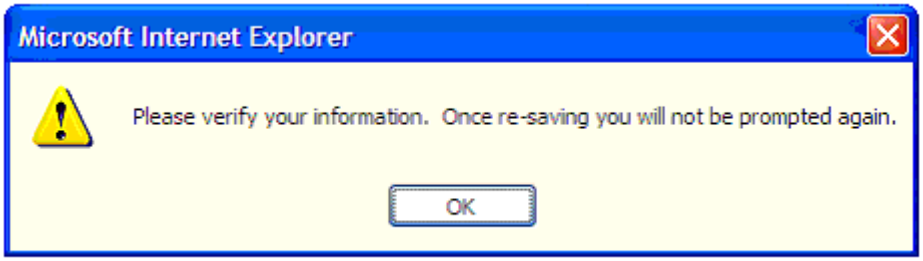


These changes will affect the agent contact information on listing sheets.

Note: Do not use dashes or parentheses in the phone number fields.

The "Web Page" field is for the URL of your business web site.

If your Association has chosen to do so, you may at some point be prompted to update your profile information or change your password. You will see the window below (or something similar) immediately after logging into InnoVia. Click "OK" and you will be directed to your profile information. Make any necessary changes and click the "Save" button. You will only be prompted to do this one time.



Alias Feature

This feature allows you to log in with your user name and password and appear as if you are logged in as another agent in your office. This will allow the administrative staff to print or email displays with the agent's contact information showing at the bottom instead of the administrator's information. Only those with **broker level security** will be able to input the aliases under a particular log in. The steps for setting up an alias are listed below.

- Follow the instructions in the previous section, “Agent Maintenance/ Modifying Contact Information” to access the edit screen for the agent’s information for whom you would like to set up the aliases.

- Scroll to the bottom of the "Name, Address, and General Information" section of the screen, and you will see the "Alias" field.

- In the "Alias" field, input the Login ID of each agent they need to log in as. Separate multiple Login IDs by a comma with no space in between. There may be an Alias button to the left of this field that you can click to look up the Login ID's. (depending on your MLS system)

- Click "Save", to save the changes you have made to the agent's profile.

Once you have saved the aliases under a particular agent's profile, that agent can then begin to login as an alias. If the agent was logged in to InnoVia at the time the aliases were added, they would need to log out and log back in, in order to be able to use this feature.

Alias (cont)

When the agent now logs into the system with their same login and password, they will be taken to a new screen, asking them who they would like to log in as.

- Log into InnoVia, using your login and password.
- Select the agent, from the drop down menu, you wish to be logged in as.

- Click "Log In"

You will then be logged into the system as the alias you selected. All displays with agent contact information will have the alias's contact information appearing on the display.

Note: The Alias feature is not available in all systems.

Firm Maintenance/Modifying Firm Information

To change the information shown on the Firm Display, click on “Maintenance”, then “Firm Maintenance” in InnoVia™.

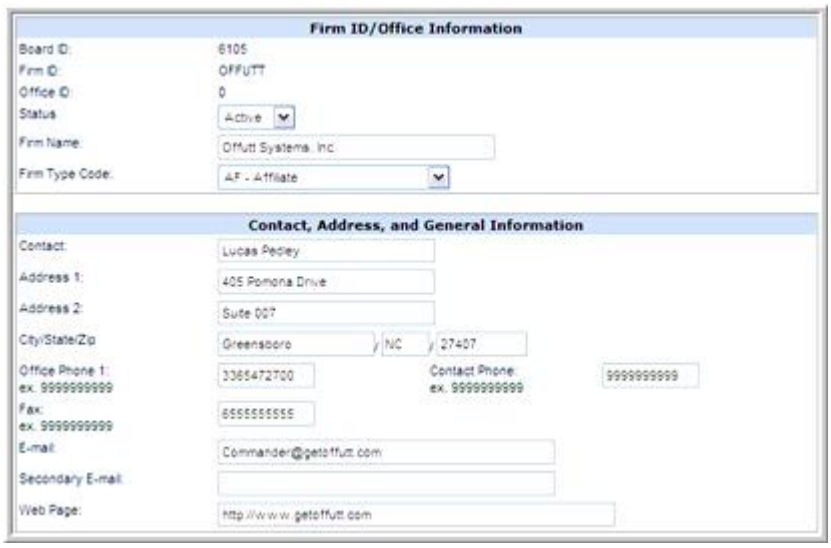
In order to modify a Firm’s information, you must first search for the Firm. This section of the system is security-driven, which means that only brokers and administrative persons will be able to change the firm information, and only that of the Firm to which they belong. The Board Office will be able to change anyone’s information.

Enter the criteria to find the firm you wish to modify, then click “Search”.

If you are a broker or administrative person, just click “Search”, and your information will appear in a one-liner format.

When the one-liner is displayed, click the “Firm ID” on the left side of the one-liner. The firm’s information page will appear.

From this point, change whatever information needs to be changed, then click "Save".



These changes will affect the firm contact information on listing sheets.

Note: Do not use dashes or parentheses in the phone number fields.

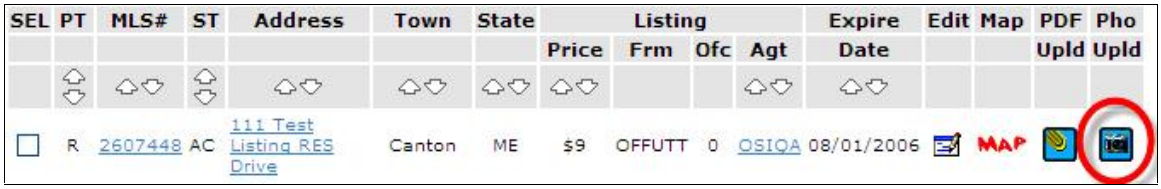
The "Web Page" field is for the URL of your business web site.

Photo Upload Utility

The photo upload utility allows you to upload photos directly into InnoVia™.

IMPORTANT NOTE: **Only JPG image format can be accepted**, **and the image size must fit your board's photo size limit.** If you use a digital camera, you will need to consult your camera's user manual to find out how to reduce the sizes of the pictures that your camera takes so they fit within your board's criteria for photo sizes. If you use a scanner to scan developed film pictures, you will need to consult your scanner's user manual to find out how to reduce the size of the files the scanner creates.

From the My Inventory section on the My InnoVia home page, click on the "Camera" icon for the listing in which you would like to upload the photos.

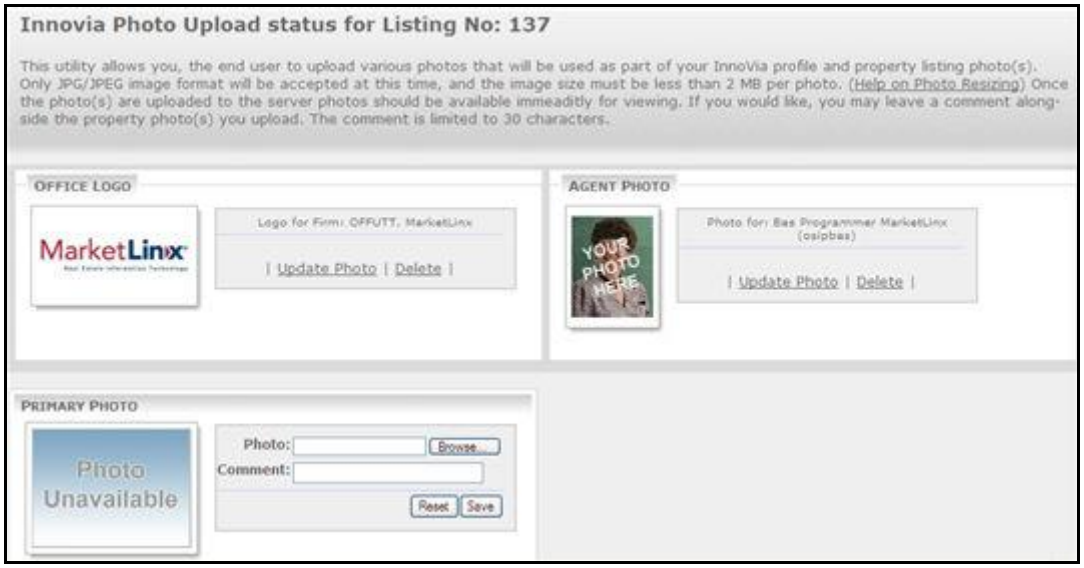


Or, to perform this function, access the **MAINTENANCE** or **MISC** tab (depending on your MLS) from the InnoVia™ navigation bar (as shown below) and select the **Property Photo Maintenance** option.

You will be presented with a search screen. From here, you can search for the listing to which you want to upload photos. You can either search by the MLS number, or by other criteria.

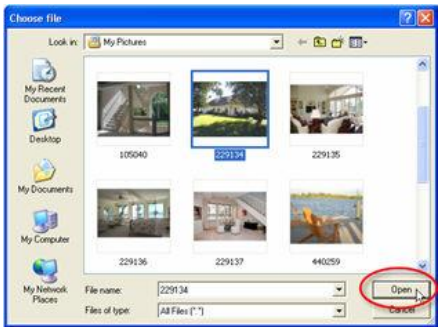
Note: This is a secure area of the system; you can only access your own listings.

Either way you access it, the upload screen will appear as shown below. There will be sections to upload not only your listing photos, but your agent photo and/or your firm logo (only brokers can upload logos for the entire firm).
***You do not need to upload your agent photo every time you upload listing photos, only when you want to change your current picture.*


Innovia Photo Upload status for Listing No: 137
This utility allows you, the end user to upload various photos that will be used as part of your InnoVia profile and property listing photo(s). Only JPG/JPEG image format will be accepted at this time, and the image size must be less than 2 MB per photo. (Help on Photo Resizing) Once the photo(s) are uploaded to the server photos should be available immeaditly for viewing. If you would like, you may leave a comment alongside the property photo(s) you upload. The comment is limited to 30 characters.
OFFICE LOGO
MarketLinx
Logo for Firm: OFFUTT, MarketLinx
| Update Photo | Delete |
AGENT PHOTO
YOUR PHOTO HERE
Photo for: Bas Programmer MarketLinx (osipbas)
| Update Photo | Delete |
PRIMARY PHOTO
Photo Unavailable
Photo:
Browse...
Comment:
Reset
Save

Listing photos are added one at a time, starting with the Primary Photo.

- Click the **Browse** button in the Primary Photo section, locate the photo you have saved on your computer, and open it.
- A comment can be added to each photo, up to **30 characters**, to be displayed on the photo gallery for that listing.
- Click the **Save** button to upload the photo. If necessary, the **Reset** button will clear your selection, before saving.



- Once the photo is saved, it is immediately available for viewing on that listing.
- At that point, the second photo and each subsequent photo can be uploaded one at a time.
- Also, once the photo is uploaded, you can double-click on the image to view it at it's full InnoVia resolution, the size it will be seen on the MLS.

Updating or Deleting Listing Photos

To update or delete photos for a listing, access the Photo Upload page as outlined above.

- Locate the photo you would like to replace or delete.
- To Delete the photo, click **Delete**. To replace the photo, click **Update Photo,** and simply upload a new one.
- To edit or add a comment, double click the link next to the photo. Be sure to save your changes.

****NOTE on Deleting Photos:**

When a listing photo is deleted, if it leaves a gap in the sequence of photos, InnoVia will ask you upon leaving the page if you would like to group the images together to fill in the gap. Simply click OK, and the photos will be automatically shifted for you, or click Cancel, and fill in the gap yourself.

If you delete the Primary Photo, the Hi-Res version of that photo will be deleted as well. The Hi-Res (or high resolution) photo is the larger version, visible when you click on the Primary Photo from a full display. If a new Primary Photo is not uploaded, InnoVia will shift the second photo into the Primary Photo position. The Hi-Res image will remain unavailable until a new primary photo is uploaded.

Agent Photo/Firm Logo Upload

Both the “Agent Photo Maintenance” and “Logo Maintenance” can be found under the “Maintenance” tab on the menu bar, in some systems they may be under the “Misc” tab. “Logo Maintenance” will only be present for the managing broker or anyone else in the firm that has the same security as the managing broker. Both your agent photos and logos must be in **JPG format**, and the pictures must be less than the allowable size limit posted on the upload page.

You can also upload your agent photo or firm logo from the property photo upload page, outlined previously. Follow the same instructions to upload your photo or logo as when uploading a property photo.

Listing Attachments

In InnoVia, you have the ability to upload attachments to listings, such as a seller disclosure, floor plan, lead paint disclosure or subdivision plat map. Once these have been uploaded to the system, users will click on the “Attachments” link from the full display to access a list of the available documents. From the list, users will click on the links to access the documents.

Documents Available For This Property:
Seller Disclosure (11800391.pdf)
Lead Paint Disclosure (11800392.pdf)
Environmental (11800394.pdf)
2 Plat Maps (11800395.pdf)
Use the BACK button on the control panel to return to InnoVia.

There are two ways to attach these documents to the listings. The easy way is to click on the “Misc” tab and then click “Create Fax to PDF Cover Page”. Then you will need to do a search for the listing to which you would like to add attachments. When the one-liner appears, click the MLS number. Tell the system which type of document you would like to attach, and click “Continue”. Then print the page that appears and fax it, along with your document, to the number provided on the screen. Depending on the Board you are with, there may be a nominal charge for using this feature.

The other way to attach the document to the listing is to do it manually. Before you are able to upload seller disclosures, floor plans, etc into InnoVia, they must be converted to the **PDF** file type. In order to convert files to PDF, you must have special software. If you already have Adobe Distiller installed on your computer, you have the software that you need. To make sure, go to “Start” and “Programs”. If you see “Acrobat Distiller”, then you have the correct software installed. The Adobe Reader program is not sufficient; it cannot create PDF files.

If you do not see the “Adobe Distiller” listed under “Programs”, you will need to acquire a software program that will allow you to convert files to PDF. The Adobe program can be purchased at most software stores, or you may find other options online that you can download.

Once the proper software is installed, creating a PDF is fairly simple.

Note: The following documentation does not include any scanning graphics, or explain the process of using a scanner, because the graphics you encounter and the scanner you use could vary.

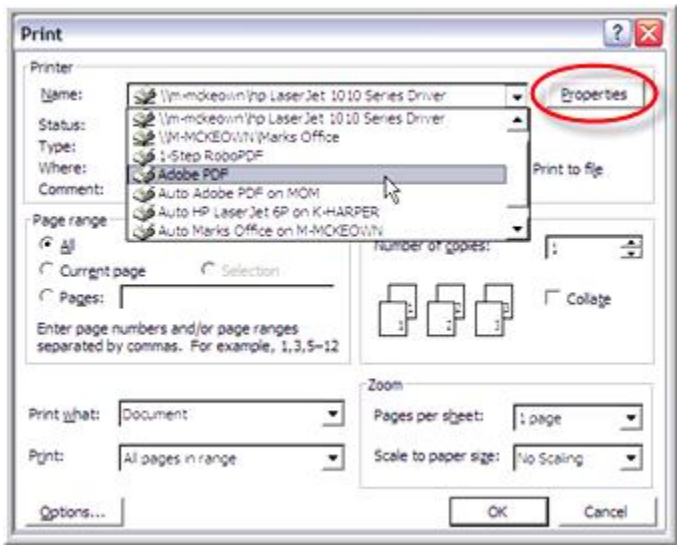
Preparing an Attachment for Upload

(converting a document to PDF file format)

Scan the document and save it to your hard drive, or if the document already exists on your hard drive, skip this step. (ANY file that can be printed can be converted to PDF).

Locate the file on your computer and double-click the icon to open it. From the menu at the top of the window, select “File” and “Print” (or click the print icon).

When your printer interface appears, select “Adobe Distiller” or “Adobe PDF” as your **“Printer”** (if you have another type of software you use to convert to PDF, you will select that as the “printer”).



There should be a “Properties” button on the printer interface. Click “Properties”, and make sure that your resolution is no more than 600 dpi, and, if possible, select “Black and White” as the color choice. Any options to reduce file size should be selected at this time.

With other PDF software, a different window may appear. Click “Save”, and tell the program where to save the PDF. With Adobe Distiller, the program will immediately ask you where to save the file.

When the software completes its work, your document will have been converted into a PDF file. You are ready to upload it to InnoVia™. See the following pages for instructions on the uploading of PDF attachments to InnoVia™.

Note: While scanning the document, look for the opportunity to “scan to PDF”, or “save as PDF”, as these choices will allow you to create the PDF without going through the “printing” step.

Uploading Listing Attachments

The PDF upload utility allows you to upload PDF files directly into InnoVia™.

NOTE: Only **PDF files** will be accepted, and there is a file size restriction which will be posted on the upload screen. If you are not sure how to convert your documents to PDF format, see the previous page of this manual titled "Preparing an Attachments for Upload".

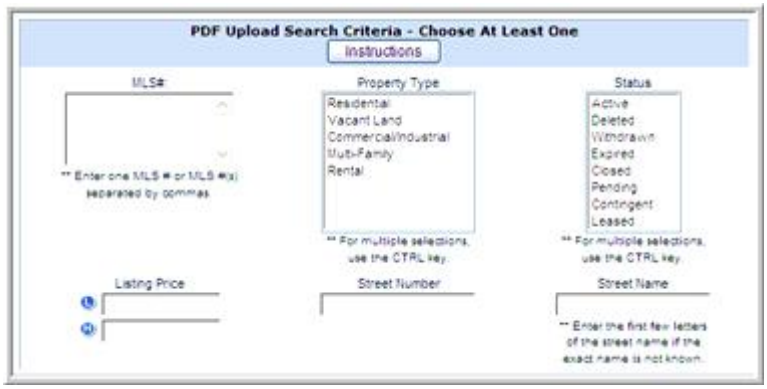
From the My Inventory section of the My InnoVia home page, click on the "paper clip" icon for the listing that you are uploading the attachment. This will take you directly to the upload screen.

SEL PT MLS# ST Address Town State Listing Expire Edit Map PDF Pho
Price Frm Ofc Agt Date Upld Upld
R 2607448 AC 111 Test Listing RES Drive Canton ME $9 OFFUTT 0 OSIQA 08/01/2006
MAP

You can also access the upload page from the **"Misc"** tab on the menu bar, click on the **"PDF Upload"** option.

A search screen will appear:

Enter the appropriate criteria to find the listing to which you wish to upload the document, then click "Search".



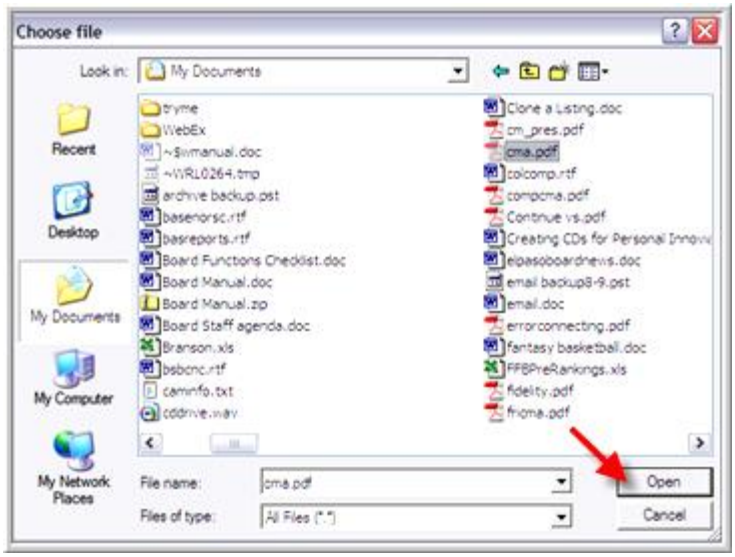
When the "Matches Found" button appears, click "Printer Friendly", and your listing will appear in a one line format.

NOTE: This is a secure area of the system, which means you will only be able to upload attachments for your own listings.

Click on the MLS # for the listing to which you would like to upload the document.

Clicking on the "Browse" button launches your Windows Explorer feature. This allows you to locate the saved PDF files on your computer.

Once you find the file that you wish to attach to the listing, double click it, or highlight it and click the "Open" button at the bottom of the Explorer window.

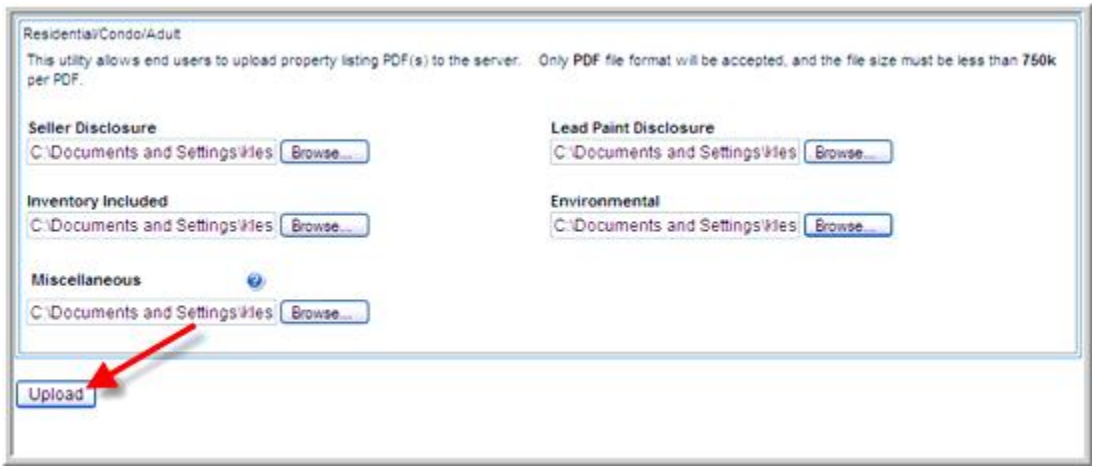


After selecting the file to be uploaded, the PDF upload screen will appear again. The “path” to the file you selected will appear in the field beside the “Browse” button. There may also be links to view or delete an attachment directly from the the upload screen.

The “Miscellaneous” attachment can be renamed. Simply delete the “Miscellaneous” text in the title field, and enter a title for the document you are uploading.

Follow this same procedure for any additional documents you wish to attach to the listing. When the files have been selected, click the “Upload” button to complete the process. A pop-up box will appear to let you know if the upload was successful, or if the file was too large, or was not a PDF file. Be patient after clicking the “Upload” button. Uploading files of this size may take a few moments, especially if you are using a dialup connection.

When the files have been selected, click the “Upload” button to complete the process.



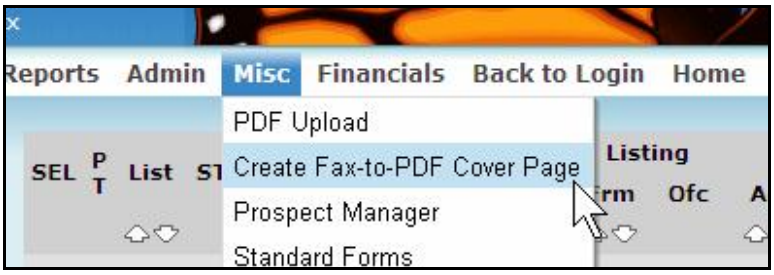
Deleting PDF Attachments

Depending on your MLS system, you may have the option to delete PDF attachments directly from the upload page. Just locate the document you would like to delete, and click “Delete” next to it. If this option is not available, you will need to use the “Delete My Listing Files” option outlined earlier in this manual.

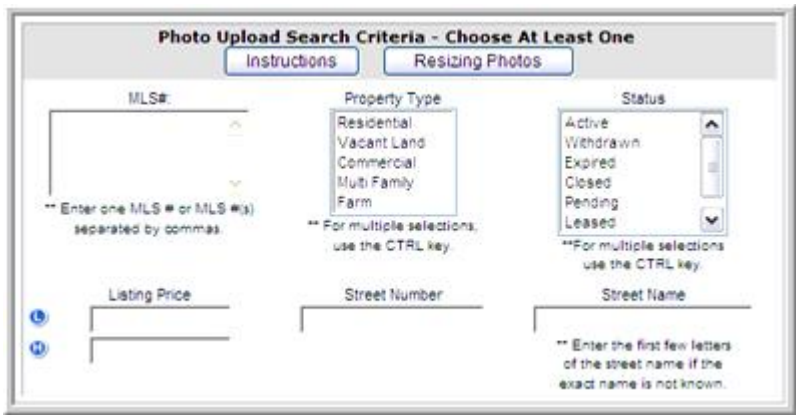
Faxing In Listing Attachments

InnoVia™ also offers the option of faxing in a document you wish to attach to a particular listing in the MLS. This option can be found under the "Misc" tab, labeled "Create A Fax-To-PDF Cover Page".

Access the "Misc" tab from the menu bar and select the "Create A Fax to PDF Cover Page" option.

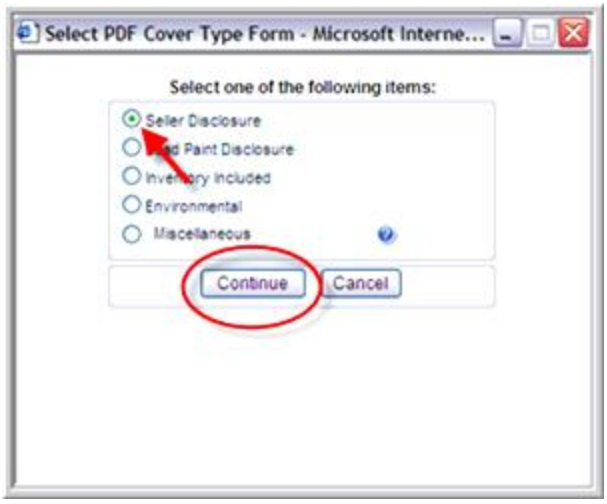


Enter the appropriate criteria to find the listing for which you wish to fax in the document, then click "Search".

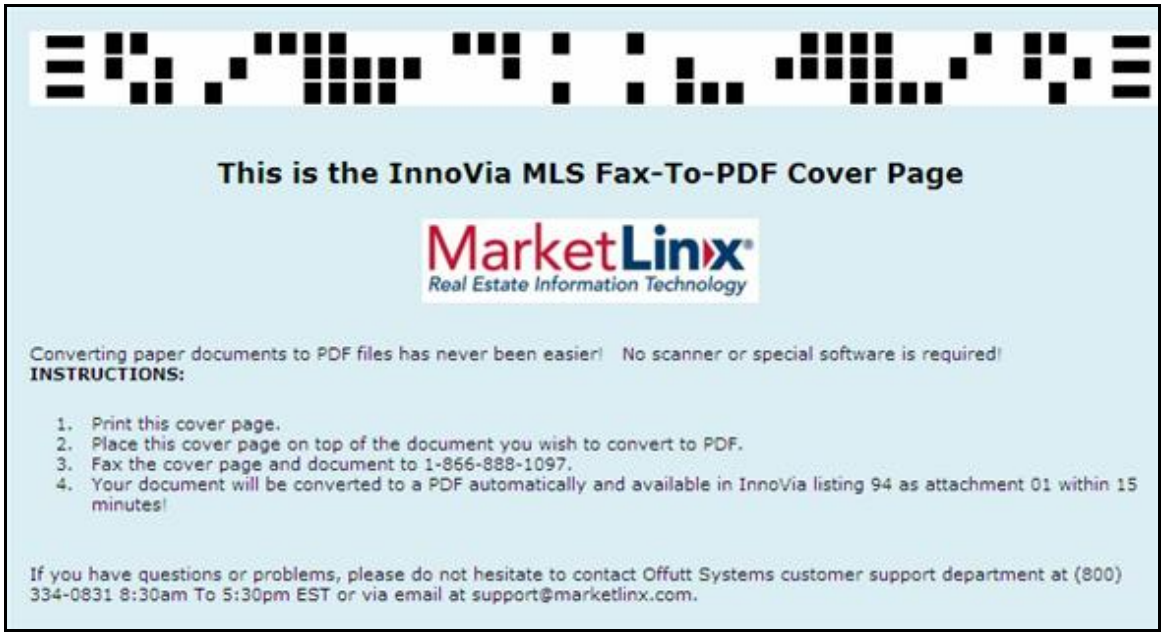


Click on the MLS # for the listing you would like to add the document.

Once you click on the MLS number, a pop-up window will appear on your screen. Select the type of document you are faxing in, then click "Continue".



At this point you will see a cover page for your document. Print out the cover page, and fax the cover page along with your document. The fax number you need can be found on the cover page.



This is the InnoVia MLS Fax-To-PDF Cover Page

MarketLinx
Real Estate Information Technology

Converting paper documents to PDF files has never been easier! No scanner or special software is required!
INSTRUCTIONS:

1. Print this cover page.
2. Place this cover page on top of the document you wish to convert to PDF.
3. Fax the cover page and document to 1-866-888-1097.
4. Your document will be converted to a PDF automatically and available in InnoVia listing 94 as attachment 01 within 15 minutes!

If you have questions or problems, please do not hesitate to contact Offutt Systems customer support department at (800) 334-0831 8:30am To 5:30pm EST or via email at support@marketlinx.com.

Comprehensive CMA

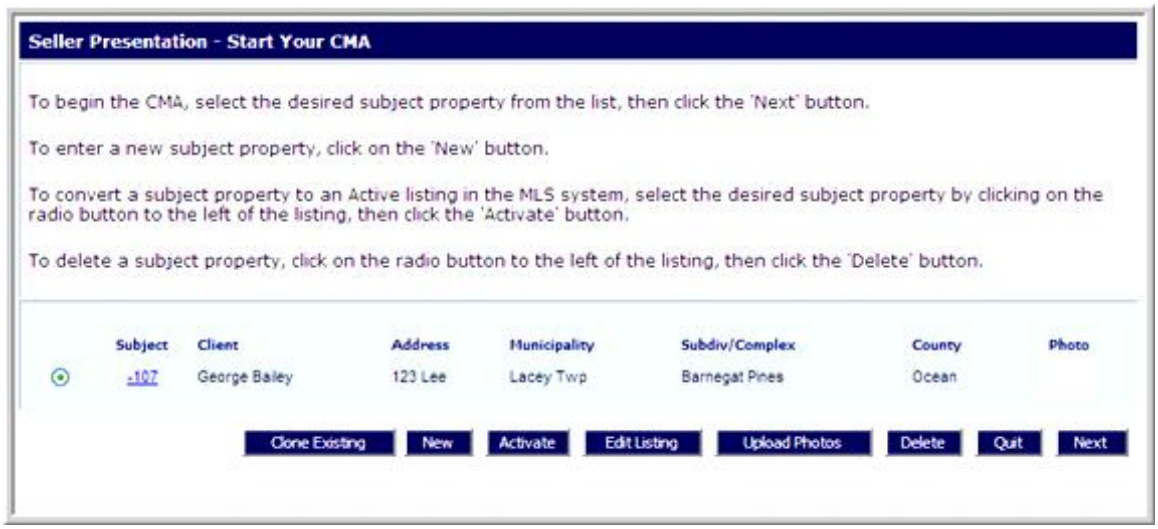
InnoVia™ offers a professional Comprehensive CMA presentation which includes not only a price adjusted comparable, but also several other components, including an agent resume, customer testimonials, flyers and more. Please ask your Board staff if you have the Comprehensive CMA feature included in InnoVia™. You will need Adobe Reader to complete the Comprehensive CMA. If you do not have it, go to www.adobe.com to download the free program.

To begin a CMA, click on "Miscellaneous" and select "Comprehensive CMA", or click on the "Comprehensive CMA" button from the home screen.

OR

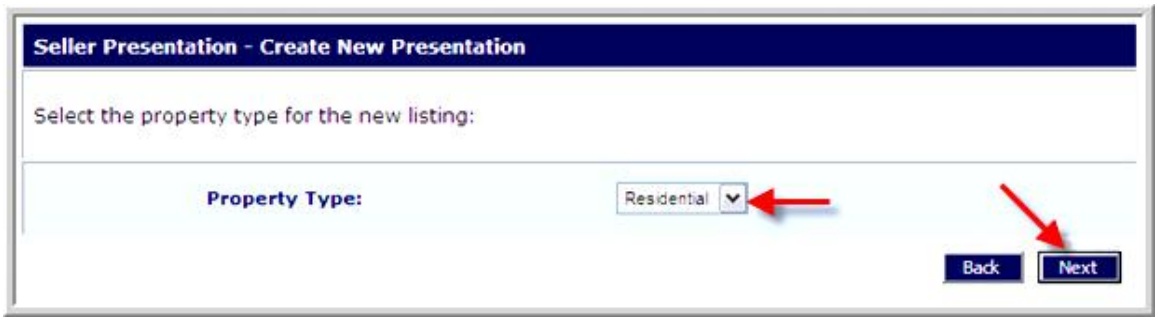
The first screen that appears (shown on the next page) is the “Start Your CMA” page. If you have used the CMA feature before, the subject properties you have entered previously will be listed, should you wish to use any of them as your subject property. To begin a CMA, your subject property must first be entered into the CMA system.

Start Your CMA

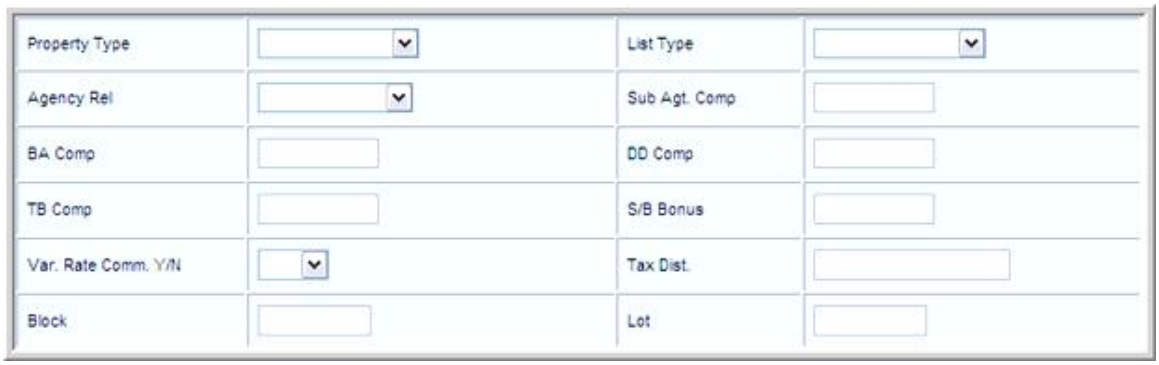

Seller Presentation - Start Your CMA
To begin the CMA, select the desired subject property from the list, then click the 'Next' button.
To enter a new subject property, click on the 'New' button.
To convert a subject property to an Active listing in the MLS system, select the desired subject property by clicking on the radio button to the left of the listing, then click the 'Activate' button.
To delete a subject property, click on the radio button to the left of the listing, then click the 'Delete' button.
Subject
Client
Address
Municipality
Subdiv/Complex
County
Photo
-107
George Bailey
123 Lee
Lacey Twp
Barnegat Pines
Ocean
Clone Existing
New
Activate
Edit Listing
Upload Photos
Delete
Quit
Next

First time users should click on "New" to enter information for a subject property so it can used in the CMA system.

Select the property type for your subject property, then click "Next". Keep in mind that your Board Office may have decided to only allow the Residential property type to be selected.



Fill in the details for your subject property, then click on “Save Listing” at the bottom of the screen.

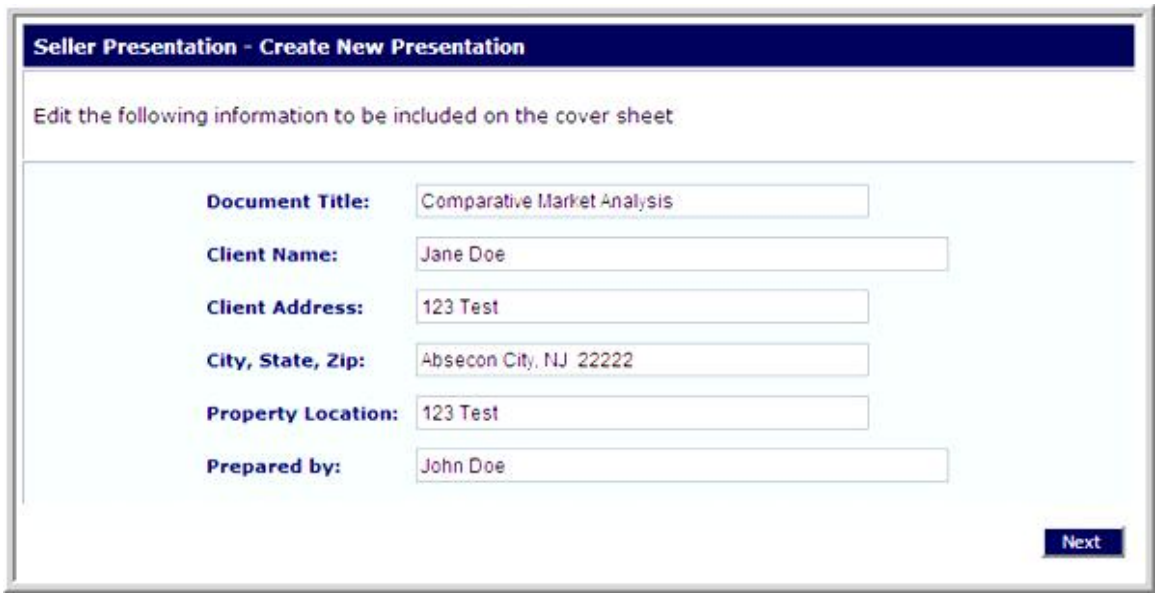


Note that only the fields appearing in **bold** or **red** letters are mandatory when entering in a new subject property. However; the CMA will use all information entered to find comparable properties. It is important that you enter as much information as possible so that all features of the property are taken into consideration when the CMA searches for comparable properties.

It is also important to keep in mind that you can easily convert the subject property into an actual MLS listing if the seller accepts your proposal, so any information entered at this time will not have to be re-entered later when you are ready to list the property. (Your Board may have chosen to disable this feature.)

When you have finished entering information about your subject property, scroll down and click the "Save Listing" button at the bottom of the screen. Clicking the “Save Listing” button DOES NOT mean the listing is entered into the MLS. All you are doing is saving the information so you can use the subject property in future CMAs.

Once you click on "Save Listing", the screen below will appear. Edit this information for inclusion on the cover sheet, then click "Next".



After clicking "Next", you will be taken back to the "Start Your CMA" page, and your subject property will appear on the screen as shown below.

Your subject property is now ready to be used in a CMA. **The listing is not active at this point**. It has a number that serves as a placeholder only. The listing will not be active until you select it and click the "Activate Listing" button on the "Start Your CMA" screen.

Note: Some Boards have chosen to disallow this feature, in which case, there will be no "Activate Listing" button on this screen.

Clone Existing Listings for your Comprehensive CMA

This function gives you the ability to take an existing listing from the InnoVia MLS System and use it as your subject property within the Comprehensive CMA. "Clone Existing" is the best way to create a Comprehensive CMA for a ***buyer***, because you can use the listing in which the buyer is interested as your subject property.

To do so, from the "Start Your CMA" page, click "Clone Existing". Then you will be prompted to enter in the MLS Number of the existing listing. Enter the MLS Number and click "Next". At that point you will be asked to enter the information on the Cover Sheet. Edit as needed, and click "Next". Your existing listing will then be added as a subject property listing that you can use for creating your Comprehensive CMA.

Click on "Clone Existing".

Enter the MLS Number, then click "Next".

Seller Presentation - Clone Existing Listing
This function will allow you to create a new subject property based on an existing listing in the Innovia database.
Enter the MLS# of the listing you wish to create a subject property from, then click on the Next button.
MLS#:
2500107
Back
Next

Edit Cover Sheet information as needed, and click “Next”.

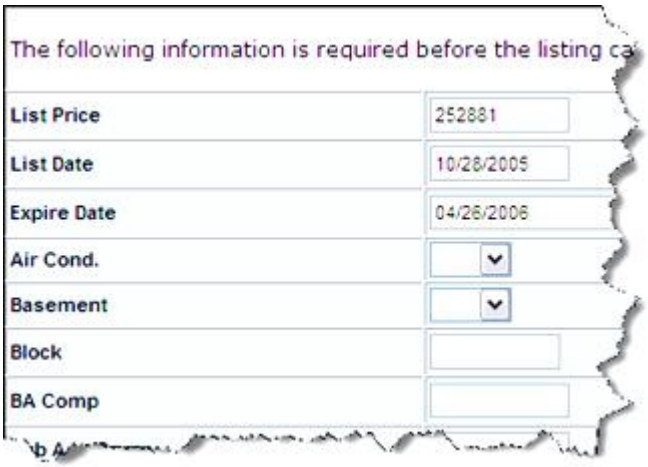
After clicking “Next”, you will be returned to the “Start Your CMA” page. Your listing will be displayed as a subject property in the Comprehensive CMA.

Edit a Subject Property

If you have used the CMA previously and would like to use a subject property from a previous CMA, select the listing and click on "Edit Listing" to make changes to the subject property, if you need to do so.

Activate a Subject Property

If you wish to make your subject property an active listing in the MLS, select the property and click on "Activate". You will be prompted to enter any other mandatory information on the next screen. Provide the requisite details, then click on "Save". You will then receive the MLS number for your new listing.



Upload Photos

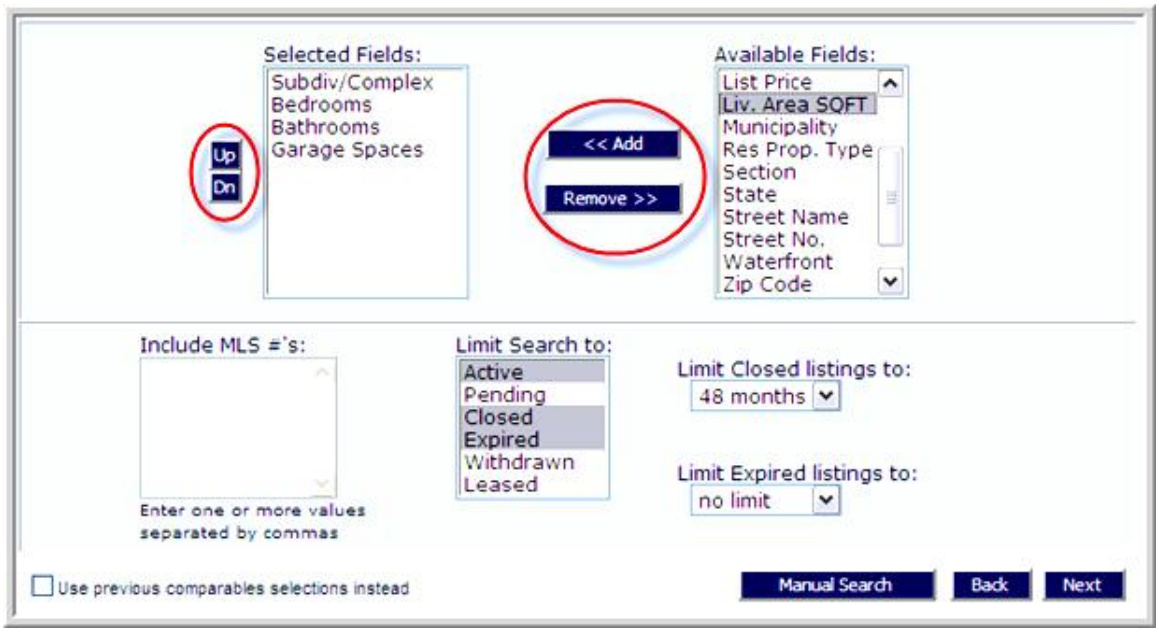
To upload photos to your subject property, click the radial button beside the subject property, then click the "Upload Photos" button at the bottom of the screen. The upload process is the same as for a live MLS listing.

Building Your CMA

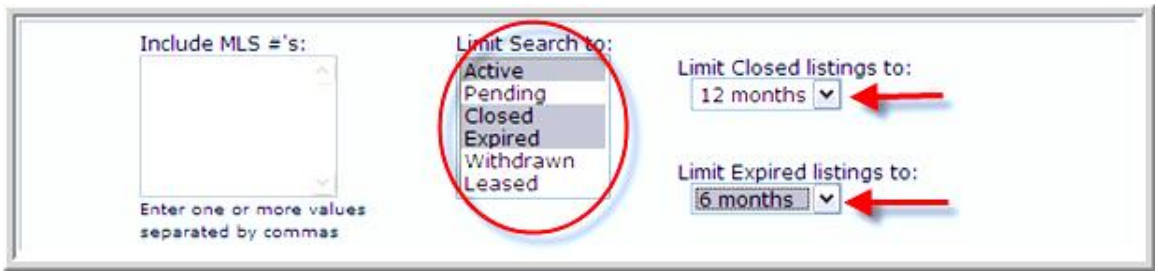
Once you entered all the details for your subject property, you are ready to create the CMA. Make sure the radio button beside the subject property is selected, and click "Next".

When the screen shown below is displayed, select the features from the menu on the right that you want the CMA system to consider when it attempts to find comparable properties. To add a feature, click on it, then click the "Add" button.

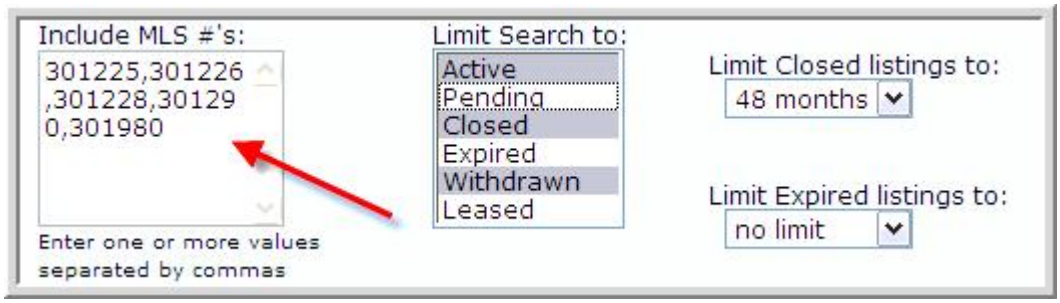
Once you have added all the features you want the system to consider, you can prioritize them by using the "Up" and "Down" buttons on the left to make them higher or lower priorities, respectively.



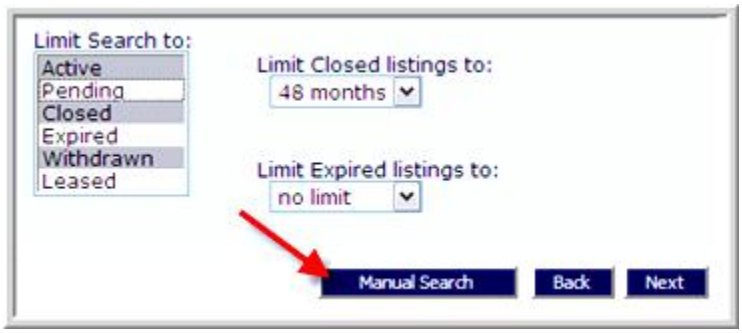
At this point you can select the statuses you would like the CMA system to search for when finding comparable properties. If you are searching for closed and/or expired listings, you can specify how far back you want the system to search through those statuses.



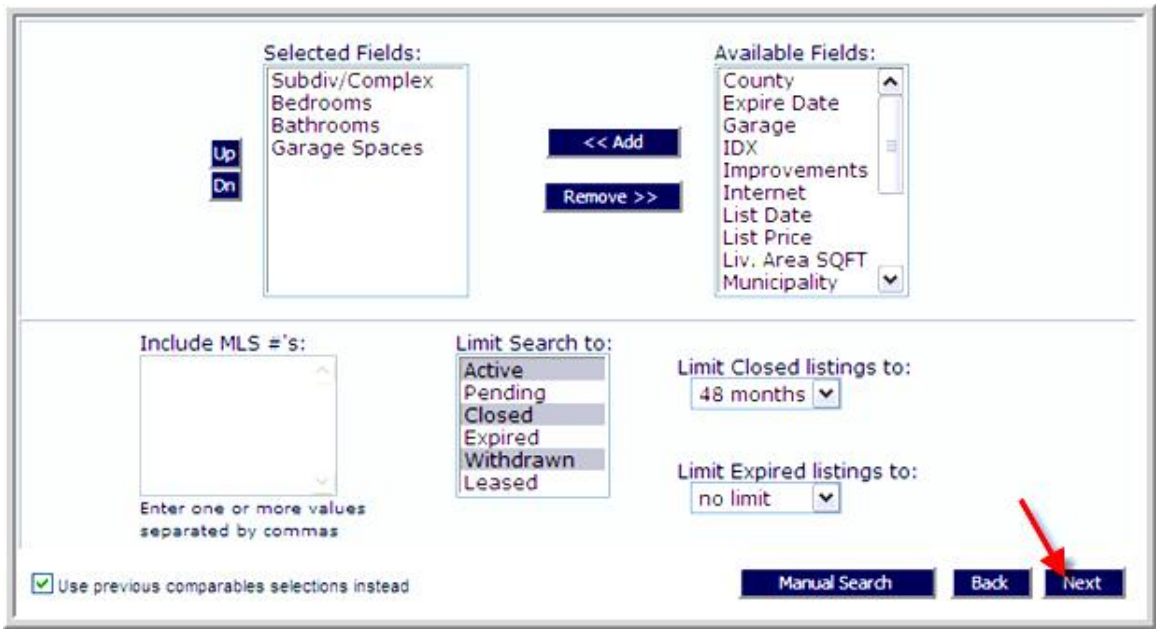
You can also enter the MLS numbers of specific listings you would like to use as comparable properties. Enter each MLS number you would like to use in the "Include MLS #'s" field, separating each MLS number with a comma (no space).



You also have the option of doing a **Manual Search** to find comparable properties. Click on "Manual Search" to return to a regular search screen and enter the search criteria you want to use for finding comparable properties. Once you have the search results, click the checkbox next to each listing you want to use as a comparable property, then click "Used Checked".



After you have entered the criteria you want to use for finding comparable properties, click on "Next". The system will find properties matching the criteria you selected.



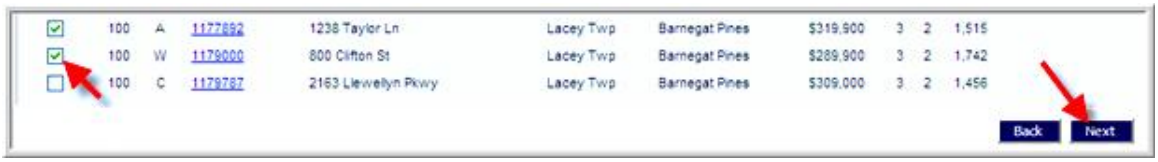
The screen shown next will appear, showing the search results for comparable properties. Select the comparable properties you would like to include in the CMA. The first four properties will be pre-selected for you, because they have the highest "Rank" of the comparables found. The ranking system is based on a 100 point scale, where comparables ranked as 100 have the exact same values for all the features selected.

For each feature of your subject property that does not match the comparable property, points are deducted from 100 at variable rates, depending on the importance or priority you placed on each feature.

If you would like more information for any of the comparable properties, click the MLS number for a Full Display.

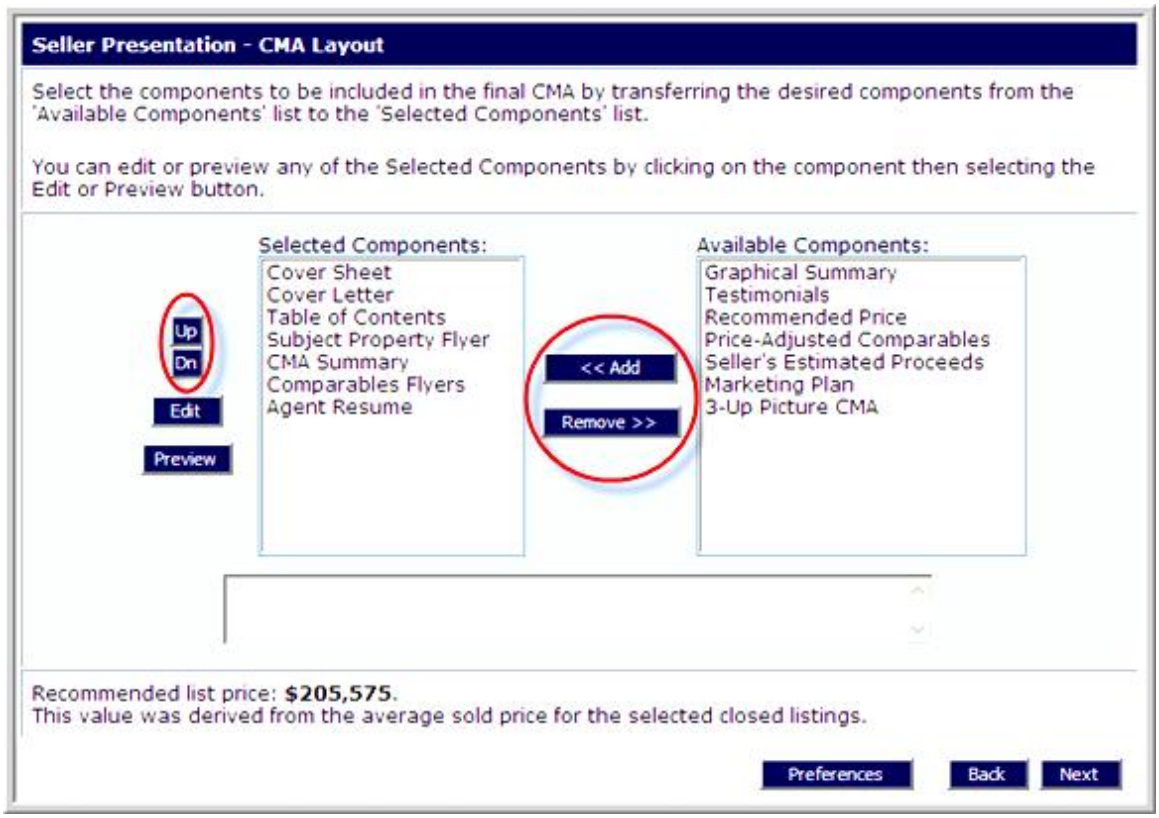
Once you have selected the comparable properties you would like to use by checking the box beside each one, click the "Next" Button at the bottom of the screen. There is no limit to the number of comparables you use, but the more you use, the longer it will take the system to create your CMA.

Select the comparable properties you would like to use in your comprehensive CMA by placing a checkmark in the "Select Checkbox", then click "Next".


100 A 1177892 1238 Taylor Ln Lacey Twp Barnegat Pines $319,900 3 2 1,515
100 W 1179000 800 Clifton St Lacey Twp Barnegat Pines $289,900 3 2 1,742
100 C 1179787 2163 Llewellyn Pkwy Lacey Twp Barnegat Pines $309,000 3 2 1,456
Back
Next

After selecting the comparable properties you wish to include, the screen shown below will appear. Select the desired components on the right, then click the "Add" button to include them in the Comprehensive CMA.

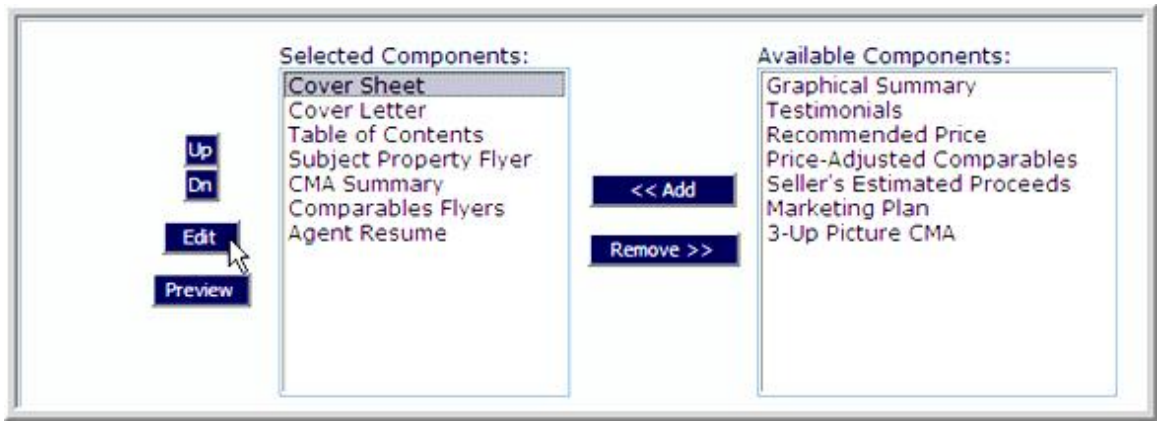
Place the components in the order in which you would like for them to appear in the final presentation. Arrange the components by selecting each one on the left and using the "Up" and "Down" buttons to reorder them.



Note: Be sure to place the Cover Sheet, Cover Letter, and Table of Contents first and in that order. Subsequent components can be in any order desired.

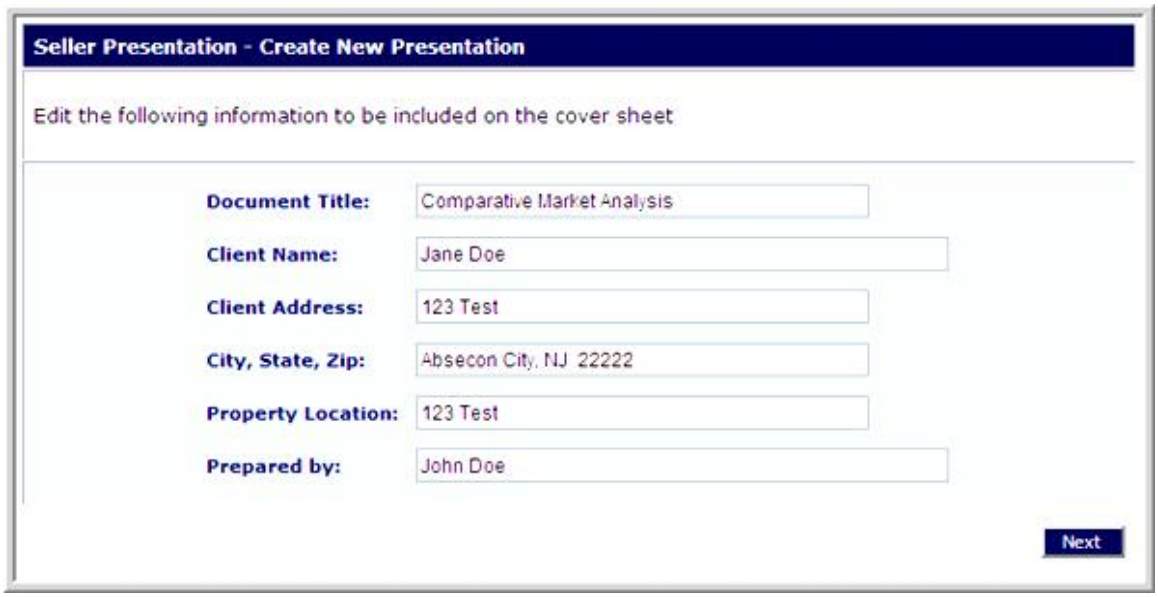
At this point, it is necessary to edit the components to suit your needs. The "Price Adjusted Comparables" component can be edited to make adjustments to any of the comparable factors, and you can also add miscellaneous adjustments for items not included by default.

The Agent Resume, Testimonials and Marketing plan components should be edited to reflect your personal information. The 3-Up Picture CMA can be edited to exclude any comparable properties that do not have photos. To edit any of the components, select the component on the left and click the “Edit” button. When you have finished editing, select “Save” or “Next” to continue.

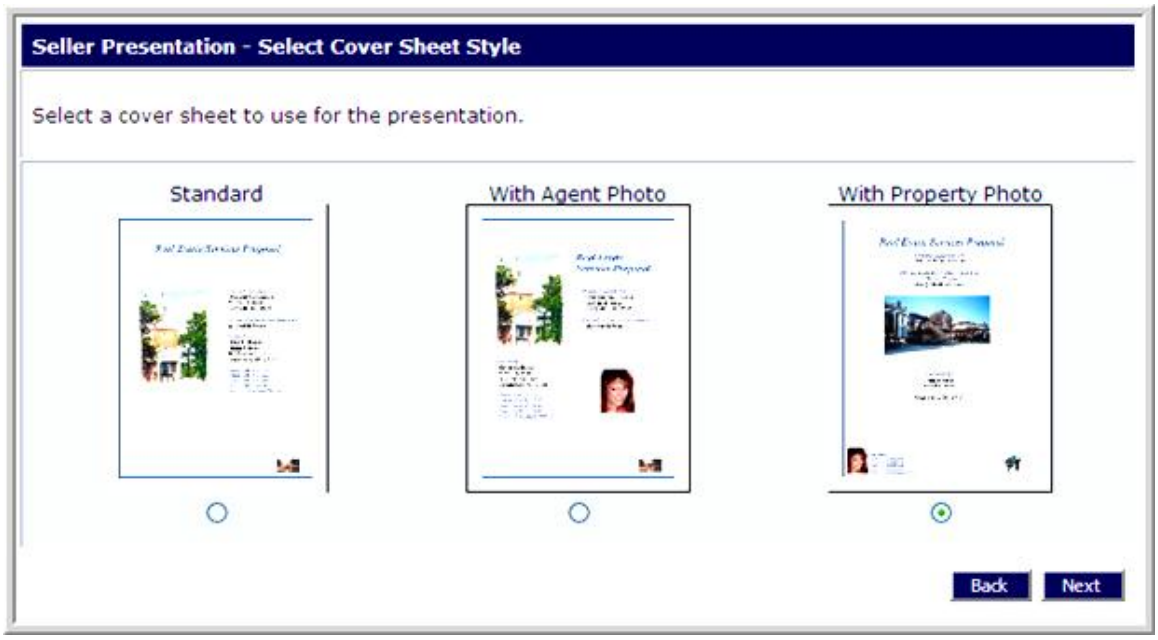


Edit Cover Page

When you edit the cover sheet, you will be able to edit the information that is included on the cover sheet. After making any changes, click on "Next".



You will then be able to select a style for the cover sheet. Make your selection by clicking on the style you want, then click on "Next".



Edit Cover Letter

A default cover letter has already been created for you. If you wish, you can edit any of the text in the cover letter. Once you are finished, click "Save". If the checkbox next to "Save as default for future presentations" is checked, your letter will be used in all future presentations you make.

Seller Presentation - Edit Cover Letter
Edit the text to be used as the cover letter for the presentation.
Thank you for selecting me to help sell your property.
I believe our marketing plan will generate a great deal of interest in this property, and I will keep you informed about our progress. With my background in real estate, and the value represented by your property, we should receive an offer soon.
As you are aware, there are many aspects to selling a property. These include finding the right price, developing a strong marketing plan, and keeping the property looking good for prospective buyers. By working together, I am confident we will get the results you want.
Please feel free to call me at any time if you have questions. I look forward to a mutually rewarding relationship with you.
Respectfully,
Save as default for future presentations
Back
Save

Note: Do not include your client's name at the top of your cover letter, and do not add your name to the bottom of the cover letter. Your client's name and your name will be added once the CMA is built, drawn from the information you included on your cover page.

Table Of Contents

The Table Of Contents is not an editable component. The Table Of Contents will be built automatically, based on the order of components in your CMA.

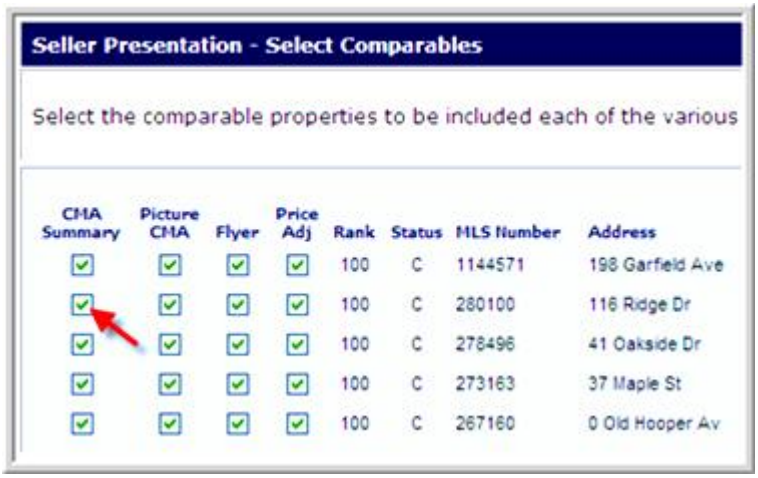
Subject Property Flyer

The Subject Property Flyer is not an editable component. The Subject Property Flyer will be built automatically, based on the information you provided on the subject property.

Editing the CMA Summary/3-Up Picture CMA/Comparable Flyers

When editing one of these three components, your only option is to select the comparable properties you want to include in a particular component. For example, if have selected 5 comparable properties for your Comprehensive CMA, you can prevent any of those comparable properties from showing up in these components.

Remove the check from the checkbox for any properties you do not wish to include in a component. Then click on "Next".

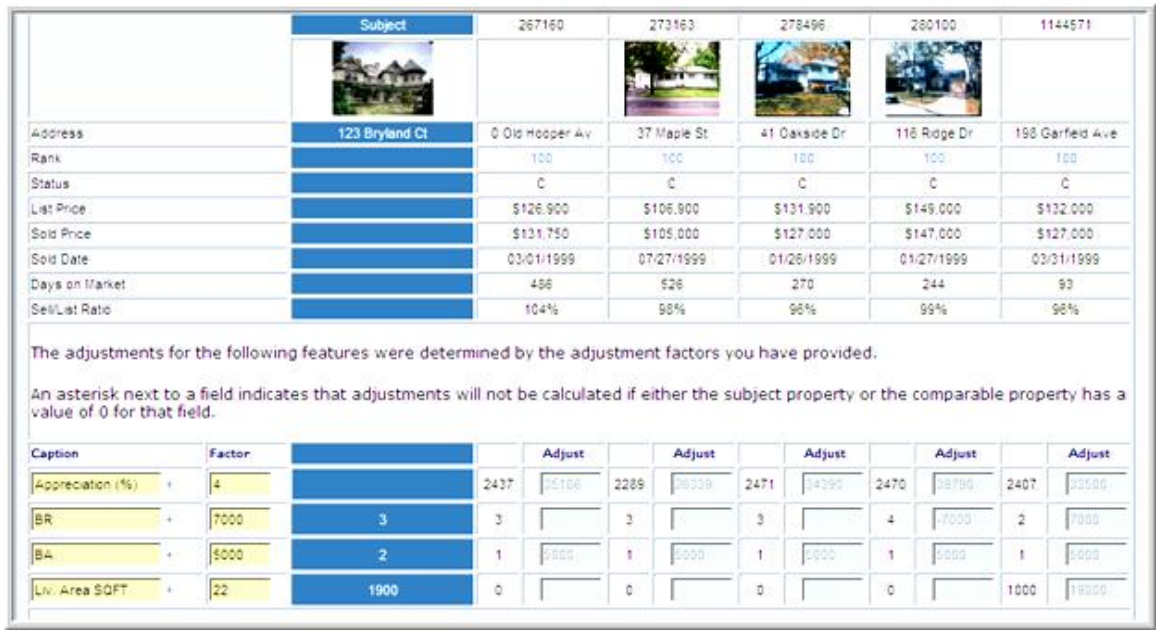


Note: When selecting the components to be included in your Comprehensive CMA, choose either the 3-Up CMA or the Comparable Flyers, but **not** both. The 3-Up CMA is a shorter summary of your comparable properties and fits three listings to a page. The Comparable Flyer provides a full page of details.

Editing the Price-Adjusted Comparables

This page compares your subject property with your comparable properties to provide a recommended price for the subject property. There are several options to choose from in getting a recommended price for your subject property.

Note: Any values assigned to the adjusted factors by default DO NOT suggest what the value should be in your area. The values are included to show you where to edit the actual value.



	Subject	267160	273163	278496	280100	1144571
Address	123 Bryland Ct	0 Old Hopper Av	37 Maple St	41 Oakside Dr	116 Ridge Dr	198 Garfield Ave
Rank		100	100	100	100	100
Status		C	C	C	C	C
List Price		$126,900	$106,900	$131,900	$149,000	$132,000
Sold Price		$131,750	$105,000	$127,000	$147,000	$127,000
Sold Date		03/01/1999	07/27/1999	01/26/1999	01/27/1999	03/31/1999
Days on Market		486	526	270	244	93
Sell/List Ratio		104%	98%	96%	99%	96%

The adjustments for the following features were determined by the adjustment factors you have provided.

An asterisk next to a field indicates that adjustments will not be calculated if either the subject property or the comparable property has a value of 0 for that field.

Caption	Factor			Adjust		Adjust		Adjust		Adjust		Adjust
Appreciation (%)	4		2437	[redacted]	2289	[redacted]	2471	[redacted]	2470	[redacted]	2407	[redacted]
BR	7000	3	3		3		3		4	[redacted]	2	[redacted]
BA	5000	2	1	[redacted]	1	[redacted]	1	[redacted]	1	[redacted]	1	[redacted]
Liv. Area SQFT	22	1900	0		0		0		0		1000	[redacted]

The Subject Property and the comparables you selected are at the top of the page. Listed below the properties are the values for each of the fields for which you elected to adjust.

You can change the values for any of the comparables by clicking the appropriate box and entering a new value. For instance, the CMA shown is using a factor of 7000.00 per bedroom. If you would like to change that factor to 2000.00, click in the “factor” field, delete 7000 and type in 2000.

The adjusted factors that you include on the price adjusted comparable sheet will either raise or lower the adjusted price of your comparable properties. For example, let's say we are adjusting by the # of bedrooms, with the subject property having 3 bedrooms and a comparable property having 4 bedrooms. The comparable property's adjusted price must be lowered in order for it to be considered "comparable". In this case; if the value per bedroom was $7400, $7400 would be subtracted from the sell price of the sold comparable property. Once you have calculated the adjusted price for each one of your comparable properties, you will then have your adjusted or recommended price for the subject property. The adjusted or recommended price of the subject property is an average of the adjusted prices for your comparable properties. If you were to add all of your comparable properties' adjusted prices and divide the result by the number of comparable properties, you would be calculating your adjusted or recommended price.

THE TOTAL ADJUSTED PRICE FOR ALL COMPARABLE PROPERTIES DIVIDED BY THE NUMBER OF COMPARABLE PROPERTIES = THE ADJUSTED PRICE FOR YOUR SUBJECT PROPERTY.

Example: 195,938 + 232,371 + 214,429 + 219,960 ÷ 4 = 215,675

For appreciation, the default value is 4 percent (but this value can be changed). The 4 percent is the appreciation on an annual basis. The CMA calculates the number of days since the sale of the property, and prorates the appreciation of the property accordingly. For example, a 100,000 dollar house, 365 days after you buy it, should be worth 104,000. If it has only been 182 days (half a year) since you bought it, then the house should (theoretically) be worth 102,000 dollars (half the appreciation of one year, or 2%).

The options at the bottom of the screen allow the user to do the following:

Add or Remove Fields: Click here to add or remove fields for use on the Price Adjusted Comparables page. In the example on the previous page, "Pool" is useless because none of the selected properties have pools. In this situation, pool should be removed and entered as a manual adjustment.

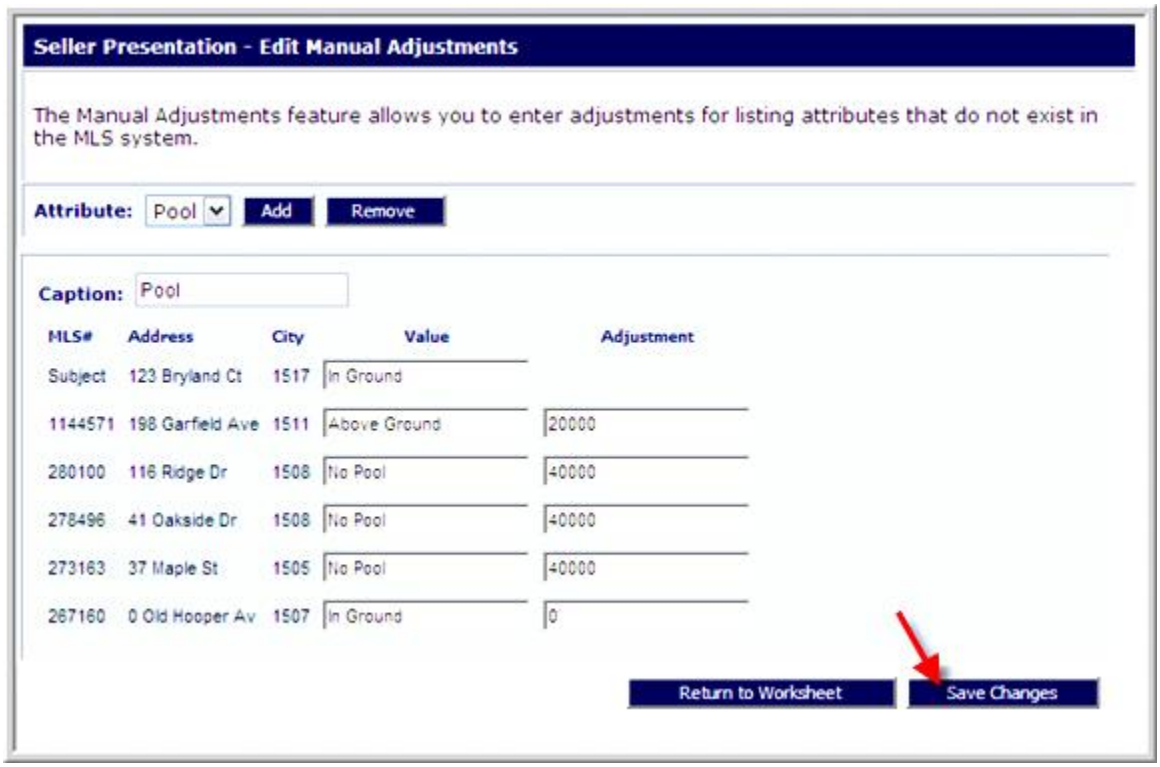
Add or Remove Comparables: Click here to remove any of the comparable properties from any of the Comprehensive CMA components. For instance, if one of the comparables does not have a picture, you may want to remove it from the Comparables Flyer section.

Manual Adjustments: Use the manual adjustments to allow for features not available on the CMA or on the comparable properties. For instance, if your subject property has an in-ground pool, you can click on "Manual Adjustments" to add this feature to the subject property. To do manual adjustments:

Click the "Manual Adjustments" button. The following screen will appear.

Seller Presentation - Edit Manual Adjustments
The Manual Adjustments feature allows you to enter adjustments for listing attributes that do not exist in the MLS system.
New Attribute:
Pool
Save
Return to Worksheet
Save Changes

Add the "New Attribute" (in our example, pool). Click the "Save" button, and the following screen will appear.



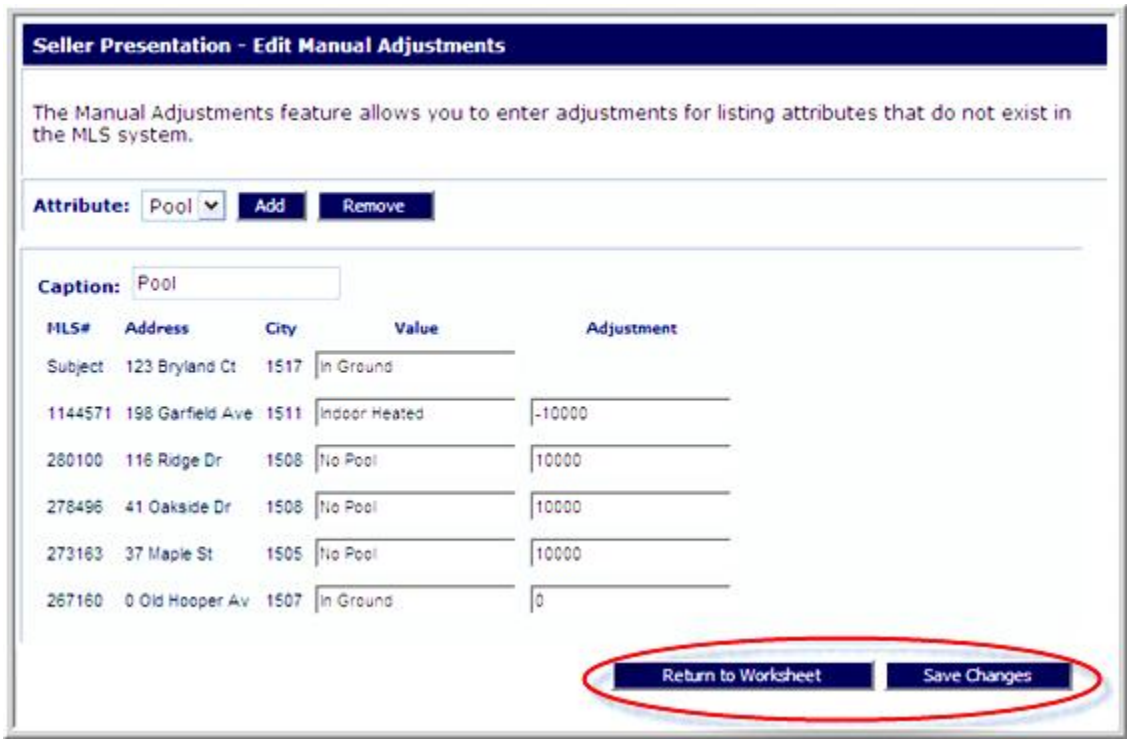
On the adjustments page, Click on “Add” to enter a title for the attribute that belongs to the subject property.

For each of the comparables, give the contrasting feature. In our example, the comparable properties had varying values for “pool”.

For those that had “No Pool” (making the comparable less valuable) we adjusted "10000" just as an example.

For the comparables having Indoor Heated Pools (making them more valuable than our subject), we adjusted “-10000”.

When finished, click "Save Changes". Then click "Return to Worksheet".


Seller Presentation - Edit Manual Adjustments
The Manual Adjustments feature allows you to enter adjustments for listing attributes that do not exist in the MLS system.
Attribute: Pool
Add
Remove
Caption: Pool
MLS# Address City Value Adjustment
Subject 123 Bryland Ct 1517 In Ground
1144571 198 Garfield Ave 1511 Indoor Heated -10000
280100 116 Ridge Dr 1508 No Pool 10000
278496 41 Oakside Dr 1508 No Pool 10000
273163 37 Maple St 1505 No Pool 10000
267160 0 Old Hooper Av 1507 In Ground 0
Return to Worksheet
Save Changes

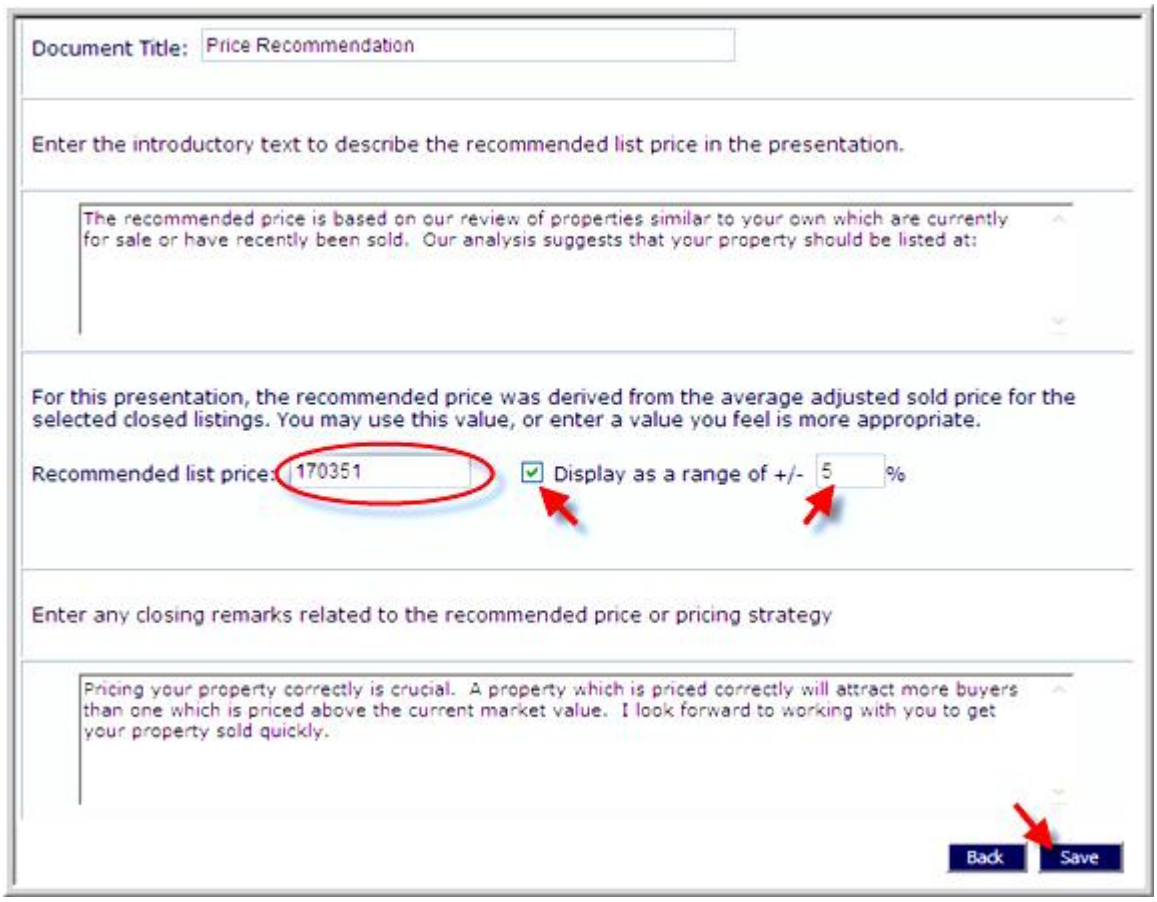
Editing the Recommended Price

This component includes the recommended price calculated from the Price-Adjusted Comparable Sheet.

You have the ability to change the recommended price provided (round the price up or down to an even number, for example).

You can also place a checkmark in the box to have the recommended price display as a range instead of an exact amount.

Any of the text in this component can also be edited.

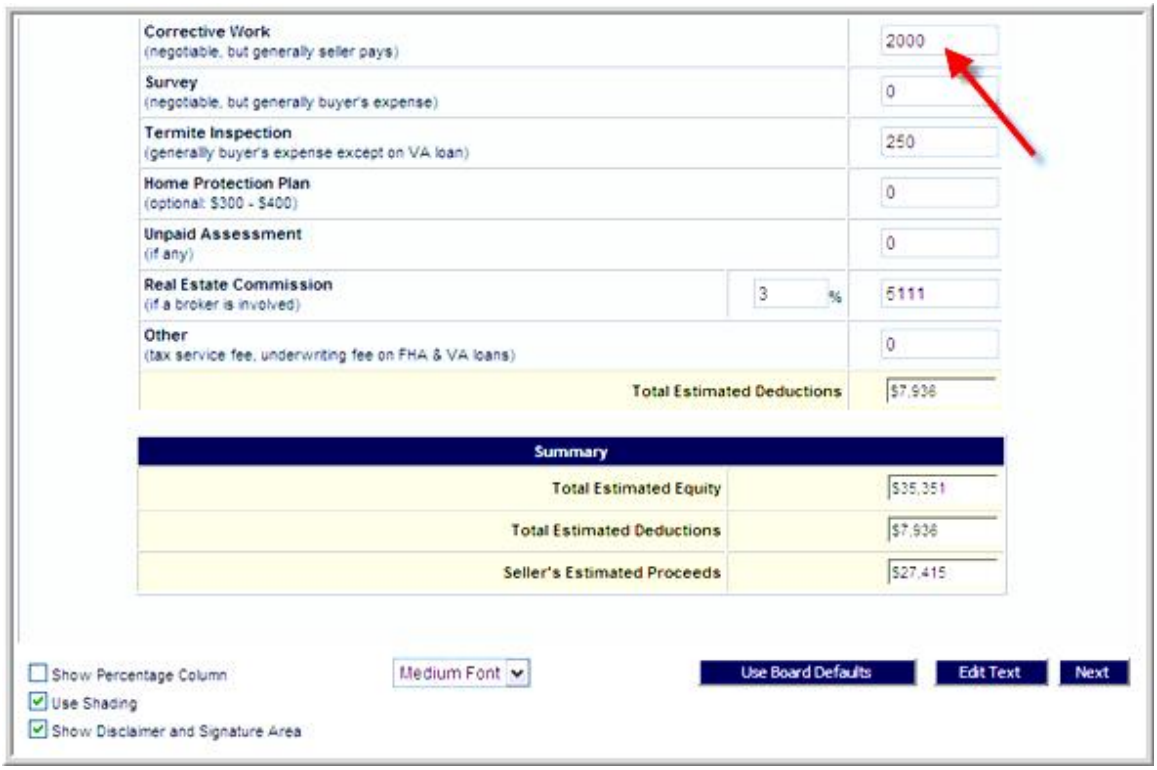

Document Title: Price Recommendation
Enter the introductory text to describe the recommended list price in the presentation.
The recommended price is based on our review of properties similar to your own which are currently for sale or have recently been sold. Our analysis suggests that your property should be listed at:
For this presentation, the recommended price was derived from the average adjusted sold price for the selected closed listings. You may use this value, or enter a value you feel is more appropriate.
Recommended list price: 170351
Display as a range of +/- 5 %
Enter any closing remarks related to the recommended price or pricing strategy
Pricing your property correctly is crucial. A property which is priced correctly will attract more buyers than one which is priced above the current market value. I look forward to working with you to get your property sold quickly.
Back
Save

Editing the Seller's Estimated Proceeds

This component will calculate the sellers estimated proceeds based off the values you include for the estimated equity and closing cost.

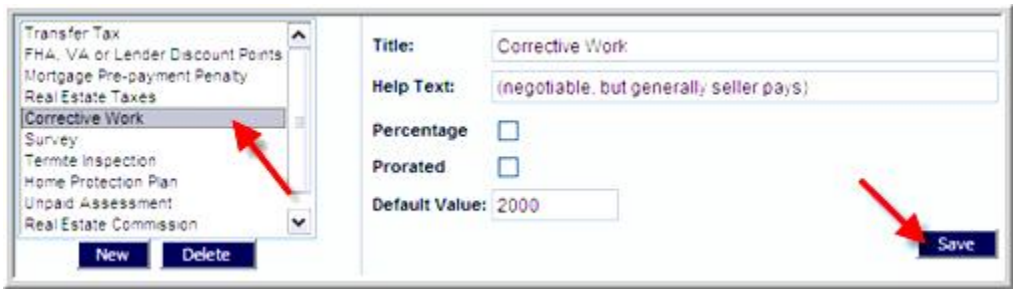
You have the ability to change the values and fields included on this page, as well as set up the default values.

Edit the values on this screen, if the value only applies to this CMA.

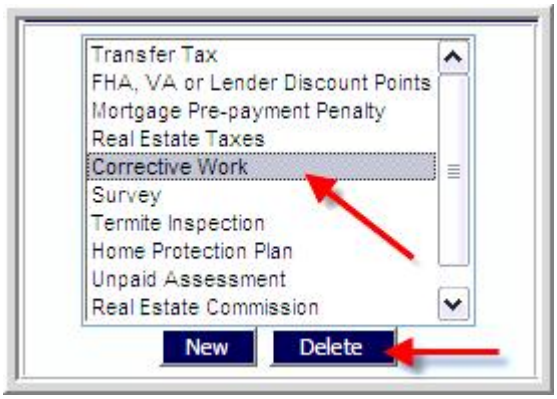


If you would like the values you enter to be present for future CMAs, click "Edit Text" at the bottom of the screen.

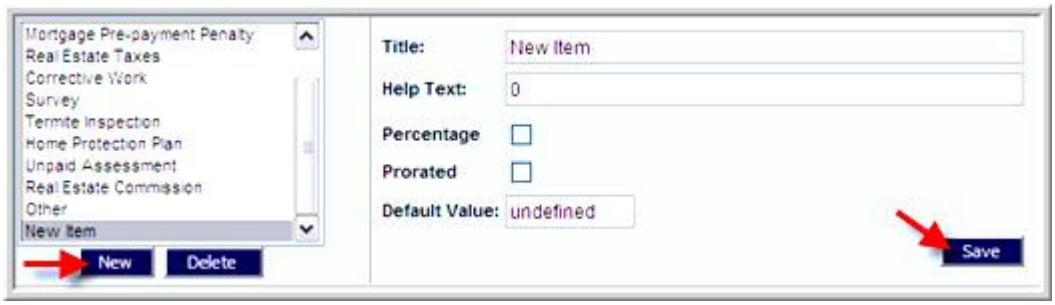
Highlight the field for which you wish to enter a default value, then enter the values into the appropriate fields. Then click "Save".



To remove a cost that does not apply to your Seller's Estimated Proceeds, click on the field, then click "Delete".



To add a cost that is not provided by default, click on "New". Then provide the details for your new cost and click "Save".



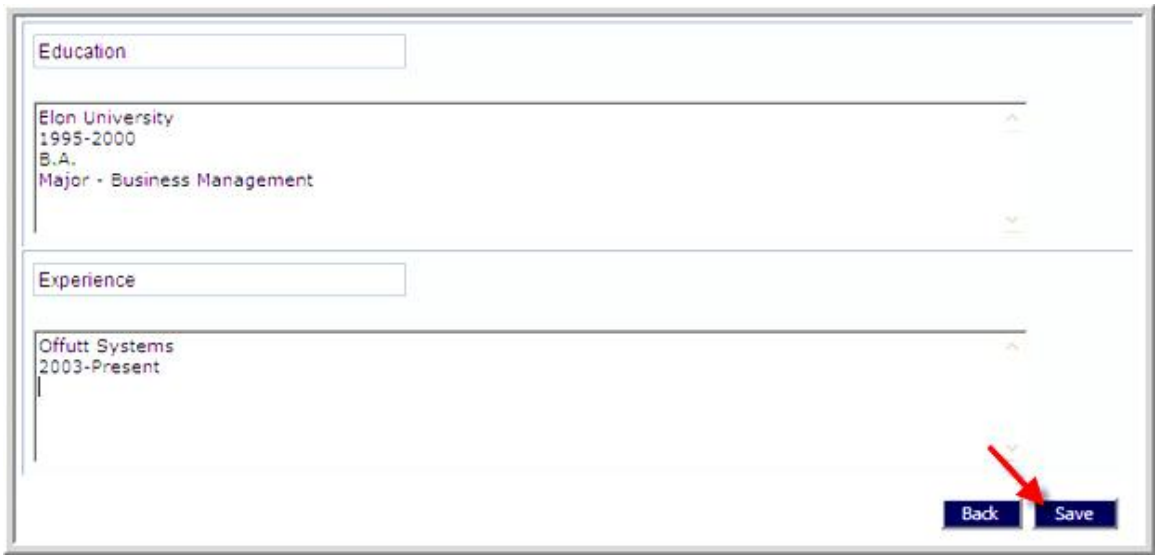
Once you have finished making your changes, click "Next" at the bottom of the screen.

Editing the Resume/Testimonials/Marketing Plan

These three components are formatted exactly the same; they are just used for three different purposes. The components will have a section to edit the title, edit the category, and edit the details for each category.

Once you have edited the component click “Save” at the bottom of the screen.

The information will be saved for future CMAs that you build.



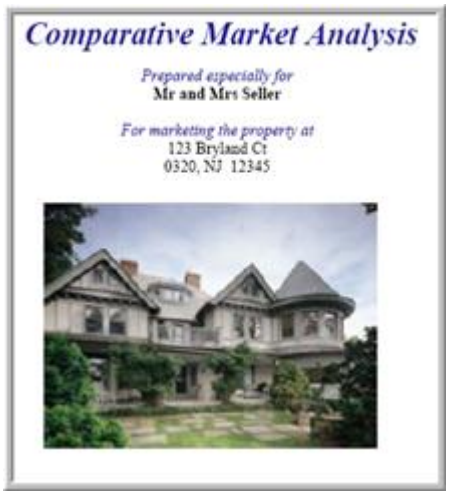
Note: The “details” sections of the resume/marketing plan is in a "bullet" format. Each time you hit the “Enter” key it creates another bullet. If you are typing a paragraph, do not hit the “Enter” key. Allow it to wrap the word around to the next line. However; we suggest you create short, one-line bulleted descriptions for ease of reading.

Finishing the Comprehensive CMA

When you have selected and edited all of the components, and arranged them as you wish, click on “Next” at the bottom of the screen.

The following screen will appear while the CMA is being built.

Your CMA will appear in “PDF” format, and you may print it out by clicking the print icon at the top of the Adobe screen. The CMA can be saved on your hard drive by selecting "File" and "Save". If, after viewing the finished product, you would like to edit any of the contents, just hit the "Back" button on your browser until you reach the desired screen.



Building Custom Displays

The InnoVia Custom Display Builder gives you the ability to customize your own displays. You can create a custom 'One-liner Display' or 'Detail Display' from scratch. Not only will you be able to choose the fields that go into the display, but you can also select how the fields will link to other reports (for example, instead of the MLS # linking to the 'Full Display', you can choose to have it link to the 'Customer Display').

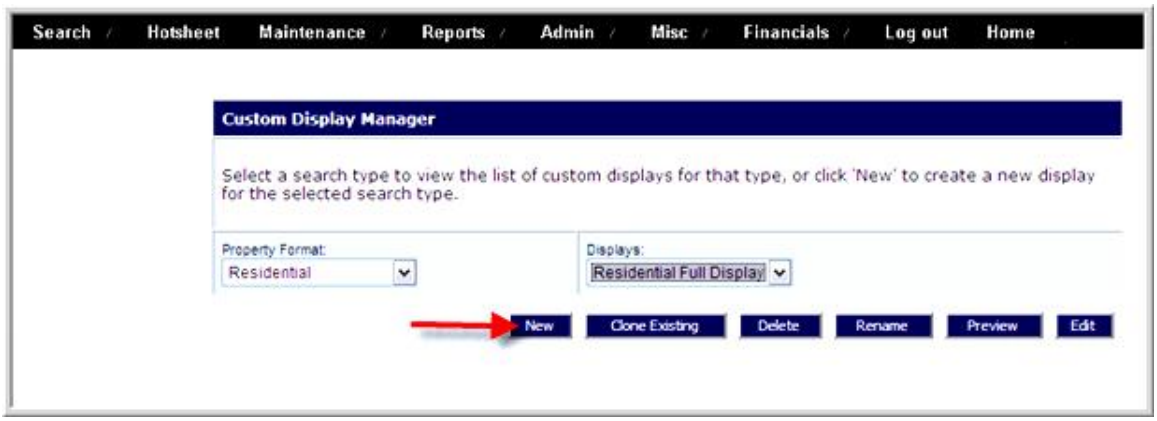
You will also have a variety of other options to choose from as you go through the steps of building the display. Once your display is built, you will be able to choose your display from the "display choice list" on the search screen. You can also set your customized display to be the default display choice.

Building a One-liner Display

To start, click on the "Search" tab, then click on "Custom Displays".

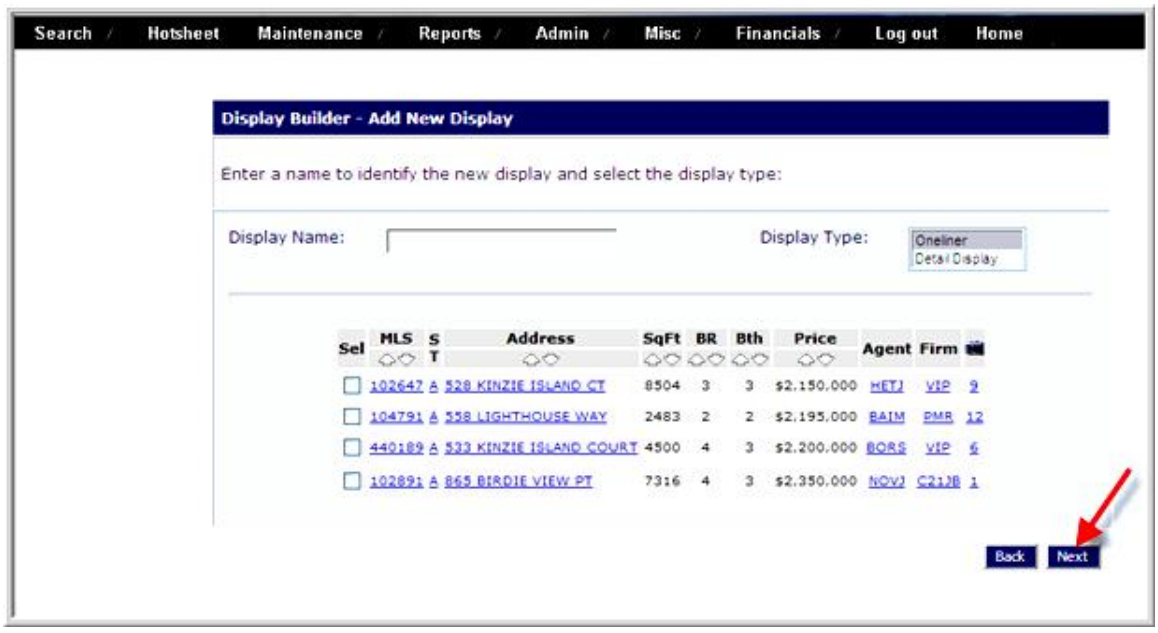
Once you click on “Custom Displays”, you will be taken to the page titled “Custom Display Manager”. Here, you can choose to edit an existing display, or choose to create a new display.

To build a new display, select the property type, then click on “New”.



Note: Under “Property Format”, you can select the property type for which you wish build the display. You will also have the option to select and create custom displays for your **listing inventory** under “Property Format”.

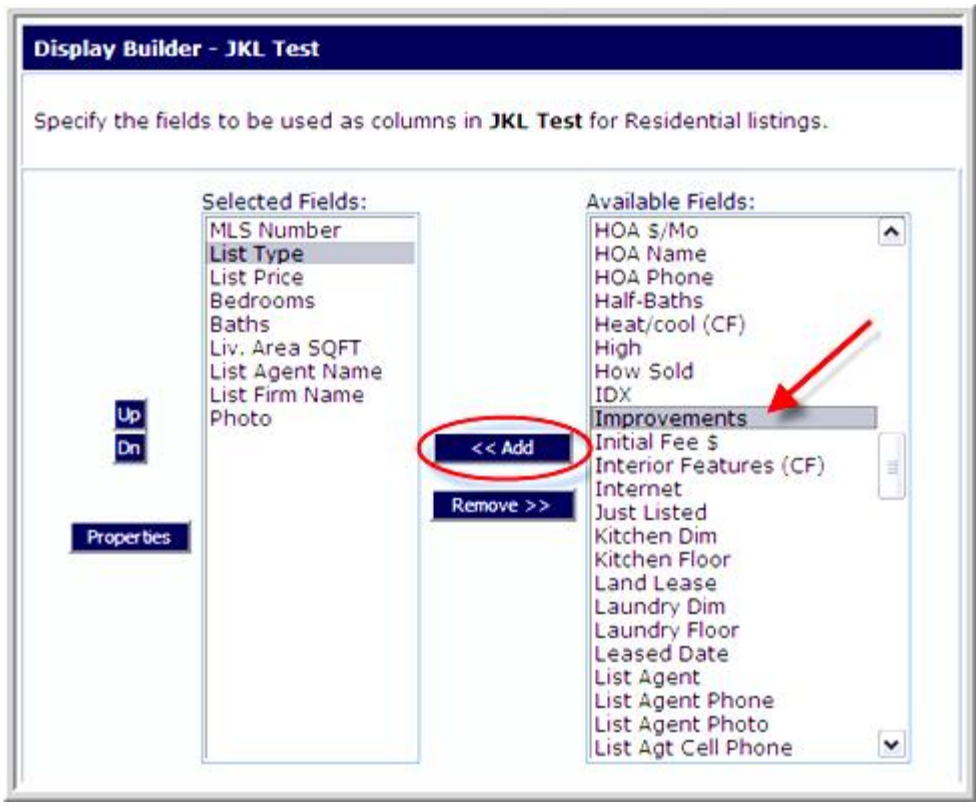
Give your display a name, and choose the “Display Type”. To build a one-liner display, choose “Oneliner” in the “Display Type” choice list. After making your choice, click on “Next”.



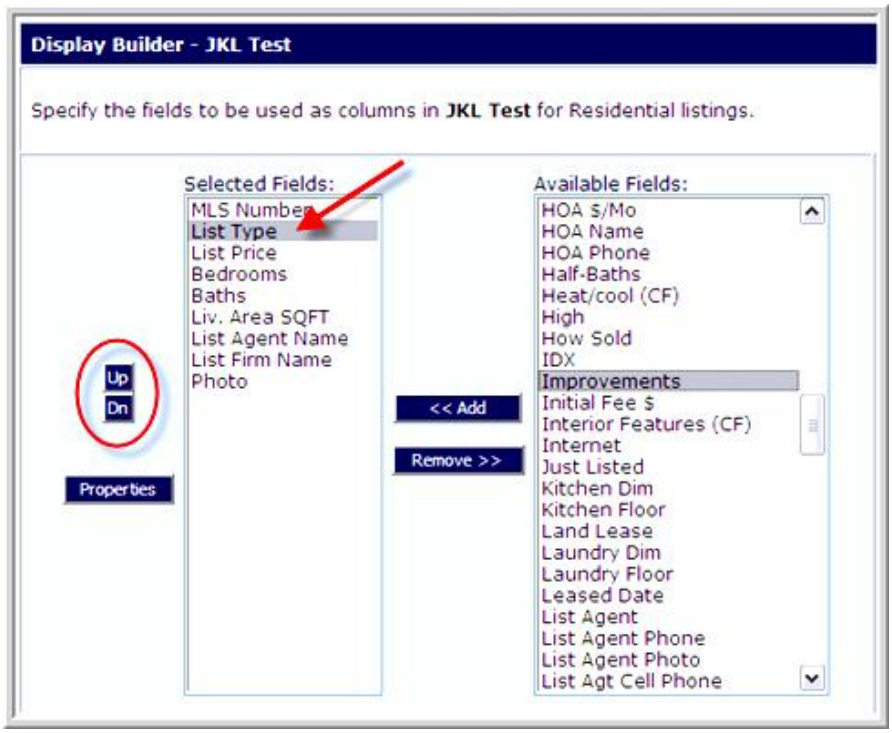
Note: Do NOT include any quotes (“ ”) in your display name; this will cause an error to occur with your display.

At this point, you will be taken to the “Display Builder” page, where you can select the fields to be included in the one-liner display. You will also have other options on this page, such as including a display title, including the “Select Checkbox”, including embedded links, and choosing the fonts for your display.

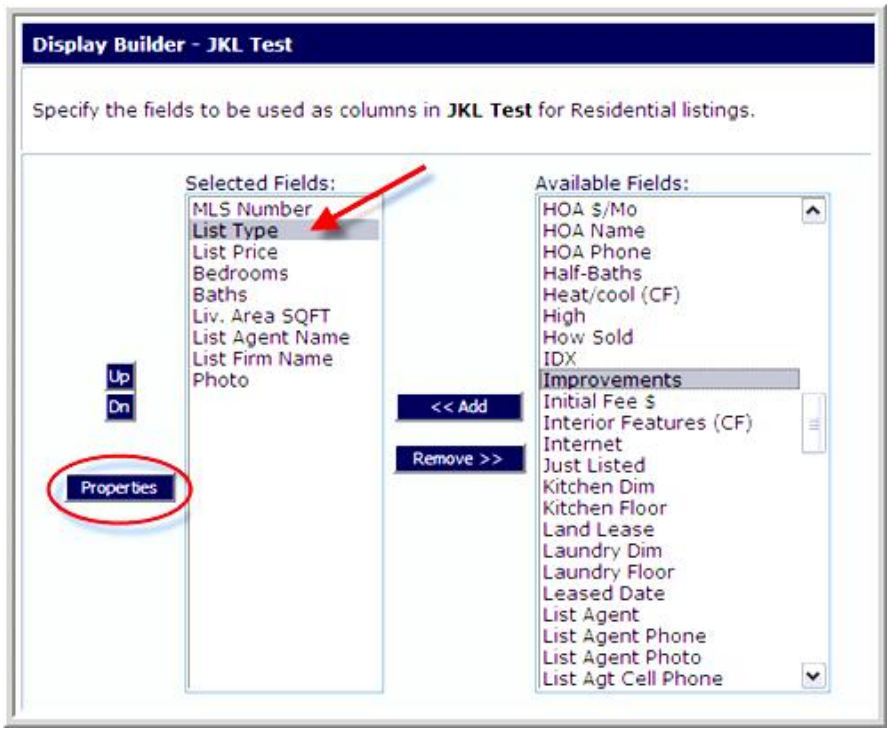
Select the field or fields you would like to include in your one-liner display. Click on “Add” to move those fields into the “Selected Fields” list.



Place the fields in the order you would like them to appear. To do so, highlight a field, then click "Up" or "Down" to move the field.



Set the "Properties" for each field. Highlight the field for which you would like to change the properties, then click "Properties".



The Display Writer Properties

In the properties window, for each field, you can change the column heading and select how the fields will be aligned. You can also restrict certain fields to only appear with certain statuses (for example, you can set the 'Days on Market' field to only appear for Active listings). The other option you are provided within the properties is to set the field to link to another display (for example, you can set the MLS number to link to a 'Customer Display' instead of a 'Full Display').

Note: Fields that are normally restricted to certain statuses will automatically be restricted. For example, if you were to include 'Expire Date' as a field in your one-liner display, you do not have set it to restrict to expired listings.

Choose the properties for each field you wish to change. Once you have changed the properties for that field, click "Save", and you will return to the previous screen.

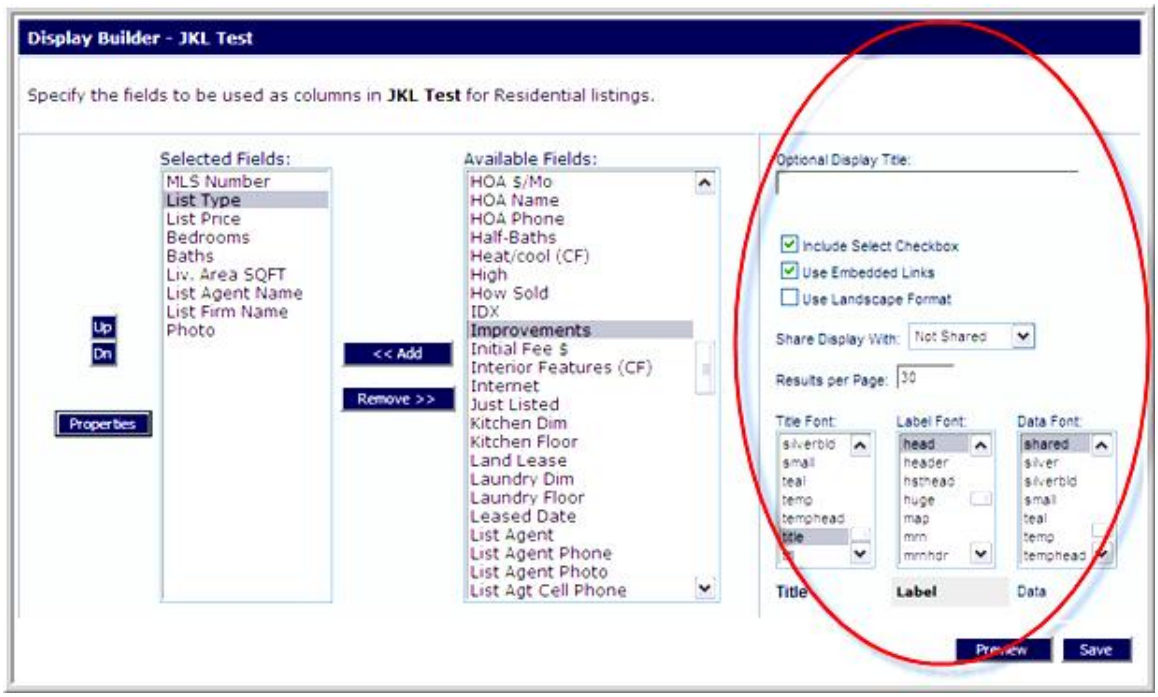
Column Heading: You can change the title of the field in your one-liner display. For instance, you can change "MLS#" to "MLS No".

Align: Select to have fields align to the left, center, or right inside its designated column.

Link to: Allows you to select a display to link to with the field you have chosen. *You must have the "Use Embedded Links" field checked on the "Display Builder" screen in order for the links you select to be available.*

Restrict to: Allows you to restrict fields to show up only in the statuses you have selected.

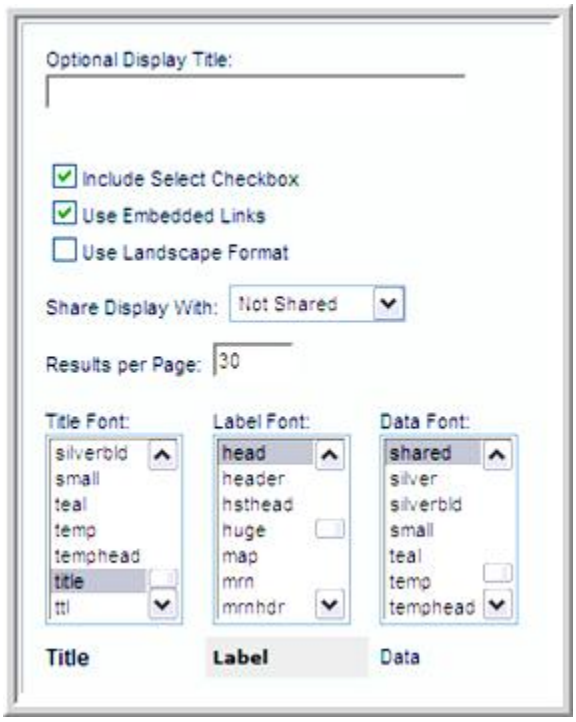
Make the other selections on this page for your one-liner display.



Optional Display Title: Allows you to type a short header at the top of each page of one-liner displays.

Include Select Checkbox: If you want to use the 'Used Checked' feature from your displays, leave this box checked.

Use Embedded Links: In order for the fields you have chosen, to link to other displays, you must have this box checked.

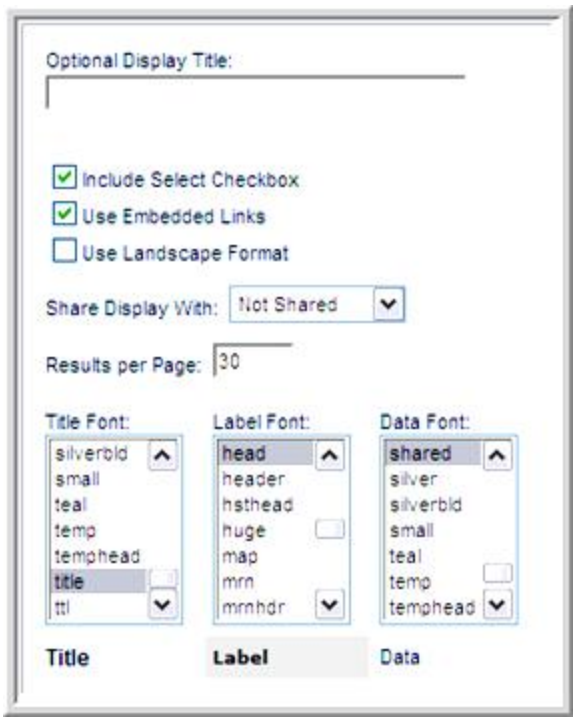


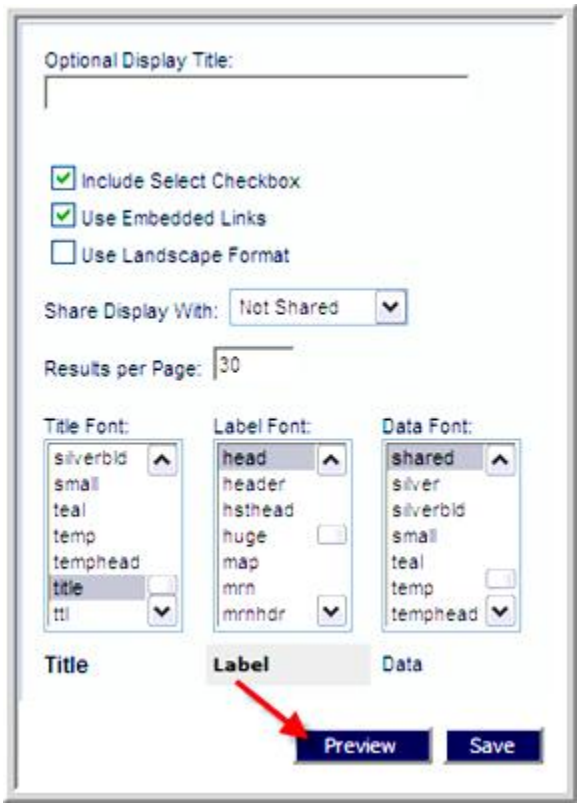
Share Display With: You have the ability to share your display with other agents in your office. Once shared, the other agents will need to copy the display into their custom displays.

Fonts: You can choose the fonts for the title of the field, the label, and the data. Highlight the font you would like to choose for each type. A preview is available for each type, below the choice lists.

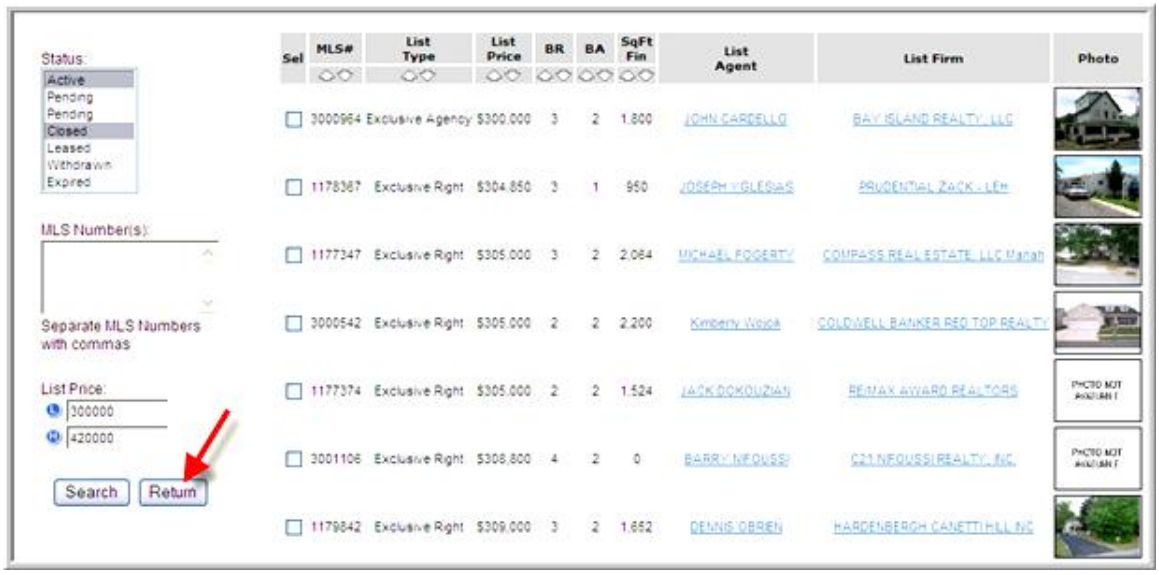
Use Landscape Format: If your one-liner display does not fit on a 8X11 page, then you can check this option to print on a 'Landscape' printed page.

Click "Preview" – We recommend that once you have completed customizing your display, you preview it to make sure it looks the way you expected.

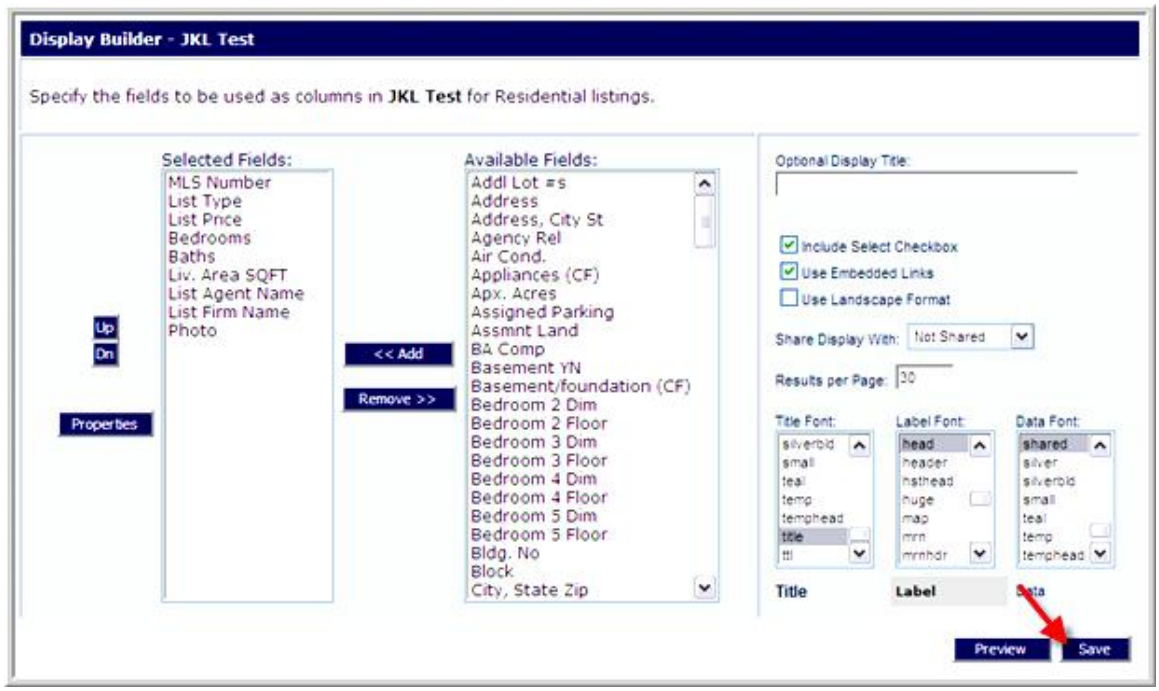




Click "Return" once you have finished previewing your display. This takes you back to the previous page, where you can further modify or save the display.

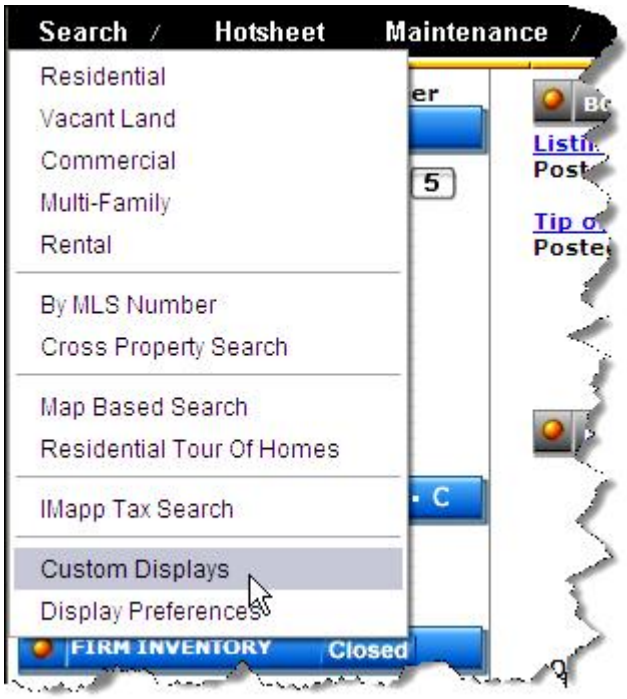

Status:
Active
Pending
Pending
Closed
Leased
Withdrawn
Expired
MLS Number(s):
Separate MLS Numbers with commas
List Price:
300000
420000
Search
Return
Sel
MLS#
List Type
List Price
BR
BA
SqFt Fin
List Agent
List Firm
Photo
3000964 Exclusive Agency $300,000 3 2 1,800 JOHN CARDELLO BAY ISLAND REALTY, LLC
1178387 Exclusive Right $304,850 3 1 950 JOSEPH VGLESIAS PRUDENTIAL ZACK - LEH
1177347 Exclusive Right $305,000 3 2 2,084 MICHAEL FOGERTY COMPASS REAL ESTATE, LLC Manah
3000542 Exclusive Right $305,000 2 2 2,200 Kimberly Wojda COLDWELL BANKER RED TOP REALTY
1177374 Exclusive Right $305,000 2 2 1,524 JACK DOKOUZIAN RE/MAX AWARD REALTORS
3001106 Exclusive Right $308,800 4 2 0 BARRY NEGUSSI C21 NEGUSSI REALTY, INC.
1179842 Exclusive Right $309,000 3 2 1,652 DENNIS OBRIEN HARDENBERGH CANETTI HILL INC

If you need to modify the display, do so at this time, then preview it again. Otherwise click "Save" to finish.



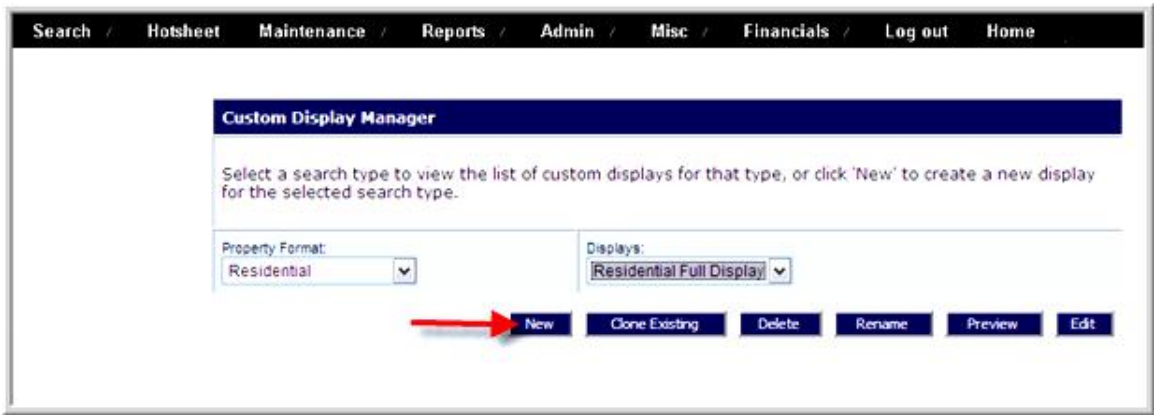
Building a Detail (Full Page) Display

To start, click on the "Search" tab, then click "Custom Displays".



After clicking "Custom Displays", you will be taken to the page titled "Custom Display Manager". Here, you can choose to edit an existing display, or create a new display.

To build a new display, select the property type first. Then click on "New".



Note: You can select the property type in which you wish build the display under "Property Format". You will also have the option to select and create custom displays for your **listing inventory** under "Property Format".

Give your display a name, and choose the "Display Type". To build a detail display, choose "Detail Display" in the "Display Type" choice list. Then click on "Next".

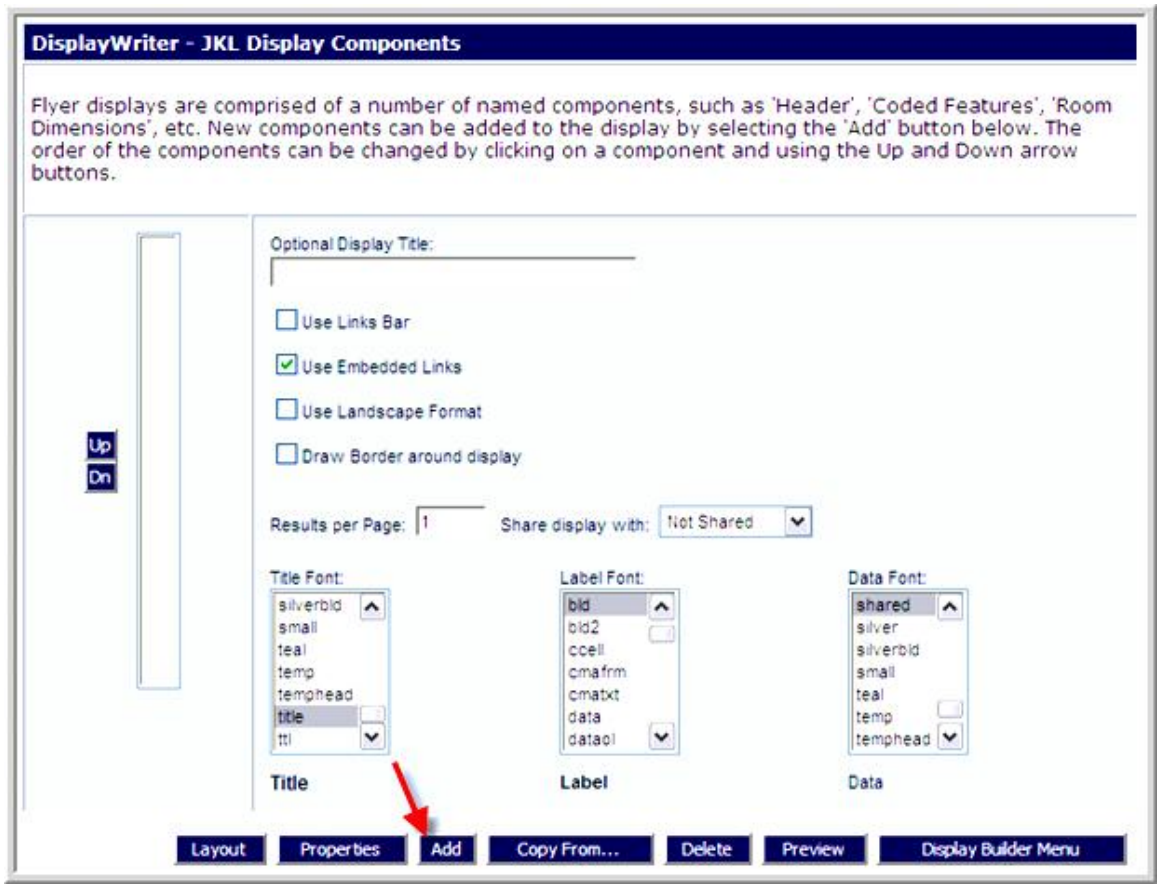
Note: Do NOT include any quotes (") in your display name; this will cause an error to occur with your display.

At this point, you will be taken to the page shown below. There you will select the components to be included in the detail display. You will also have other options on this page, such as; including a display title, including embedded links, and choosing the fonts for your display.

A component is a section of the detail display. For example, a typical full display will have 3-4 sections. The section at the top of the display would include a property photo and two columns of details about the listing. The next section might consist of columns listing the coded features. The third and fourth sections could consist of four columns of listings data only. The end result is that the 3-4 sections together make up the final detail display.

From the “Display Builder” page you will select the type of components or sections of a detailed display that you would like to add.

Click “Add” to add a section to your detail display.



Adding a Section to the Detail Display

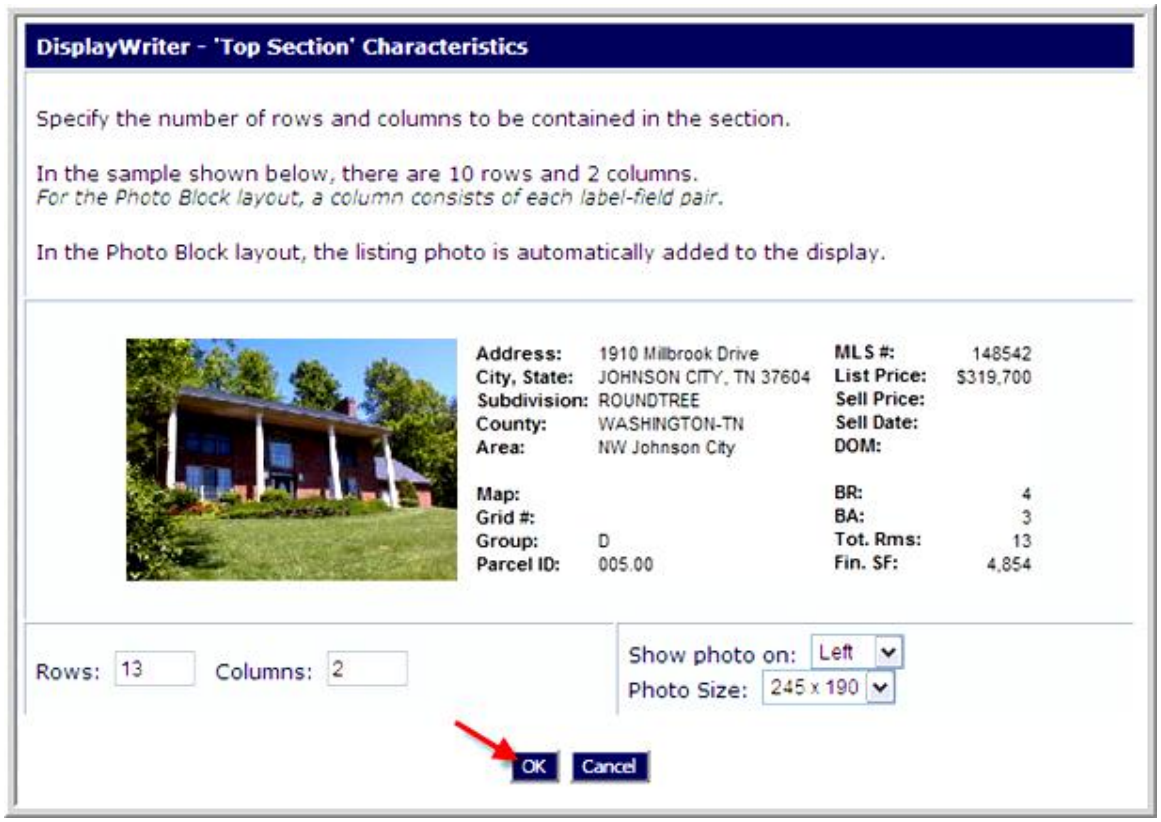
Give the section a name.

Highlight the type of section you would like to include. An example of what that section typically looks like will be seen at the bottom of the page.

Click "OK".

Once you select a section, give it a title, and click "OK", you will be taken to a page to set up the characteristics for that section. You will need to specify how many rows and columns the section will consist of. If you are adding a "Photo Block" section, you will also specify whether the photo will show on the left or the right. After entering this information, you will return back to the "Display Components" page. Generally, the default values for columns and rows work the best with InnoVia™, and changing the numbers could give undesirable results.

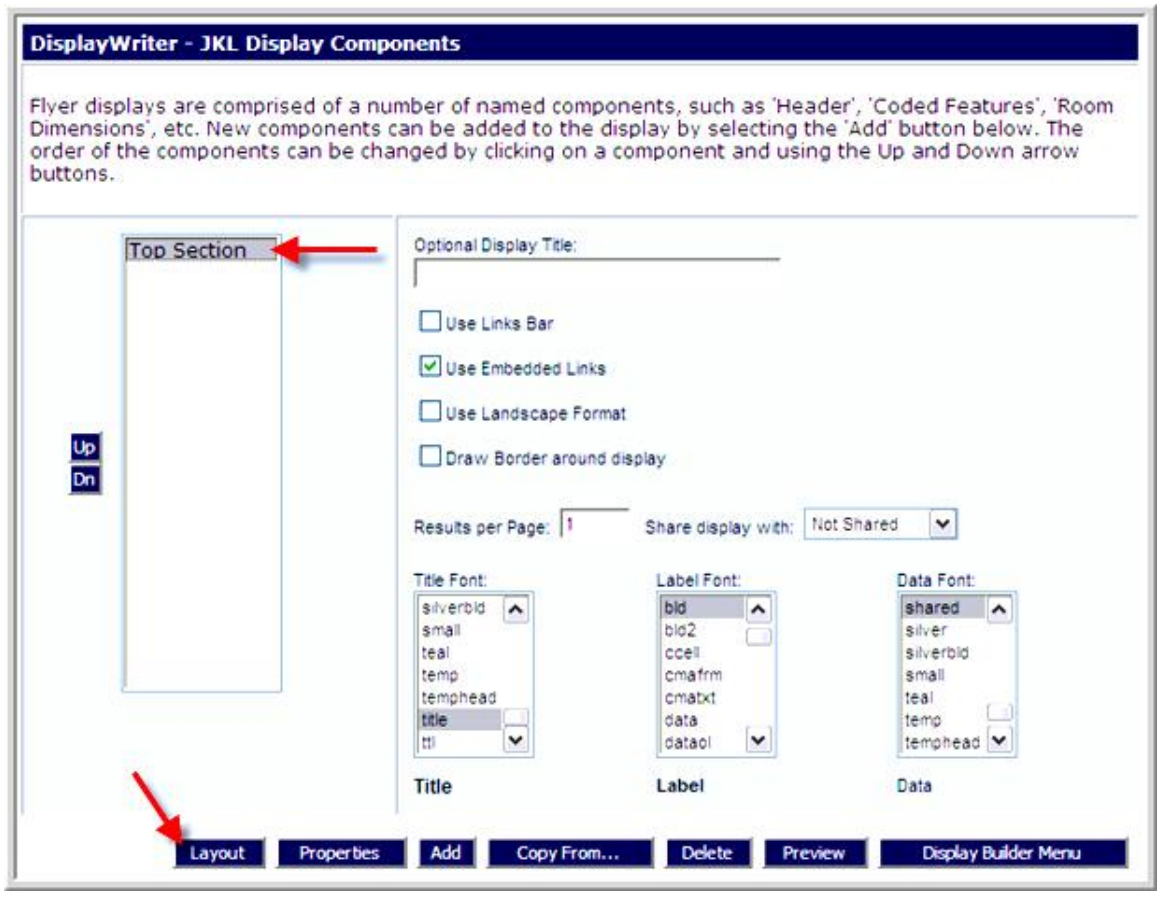
Enter the number of rows and columns to be included for that section (generally, the default values work best with InnoVia™, and changing them is entirely optional). Also, if you have selected a "Photo Block", choose whether you want the photo to show on the left or right.


DisplayWriter - 'Top Section' Characteristics
Specify the number of rows and columns to be contained in the section.
In the sample shown below, there are 10 rows and 2 columns.
For the Photo Block layout, a column consists of each label-field pair.
In the Photo Block layout, the listing photo is automatically added to the display.
Address: 1910 Millbrook Drive
City, State: JOHNSON CITY, TN 37604
Subdivision: ROUNDTREE
County: WASHINGTON-TN
Area: NW Johnson City
Map:
Grid #:
Group: D
Parcel ID: 005.00
MLS #: 148542
List Price: $319,700
Sell Price:
Sell Date:
DOM:
BR: 4
BA: 3
Tot. Rms: 13
Fin. SF: 4,854
Rows: 13
Columns: 2
Show photo on: Left
Photo Size: 245 x 190
OK
Cancel

Click "OK"

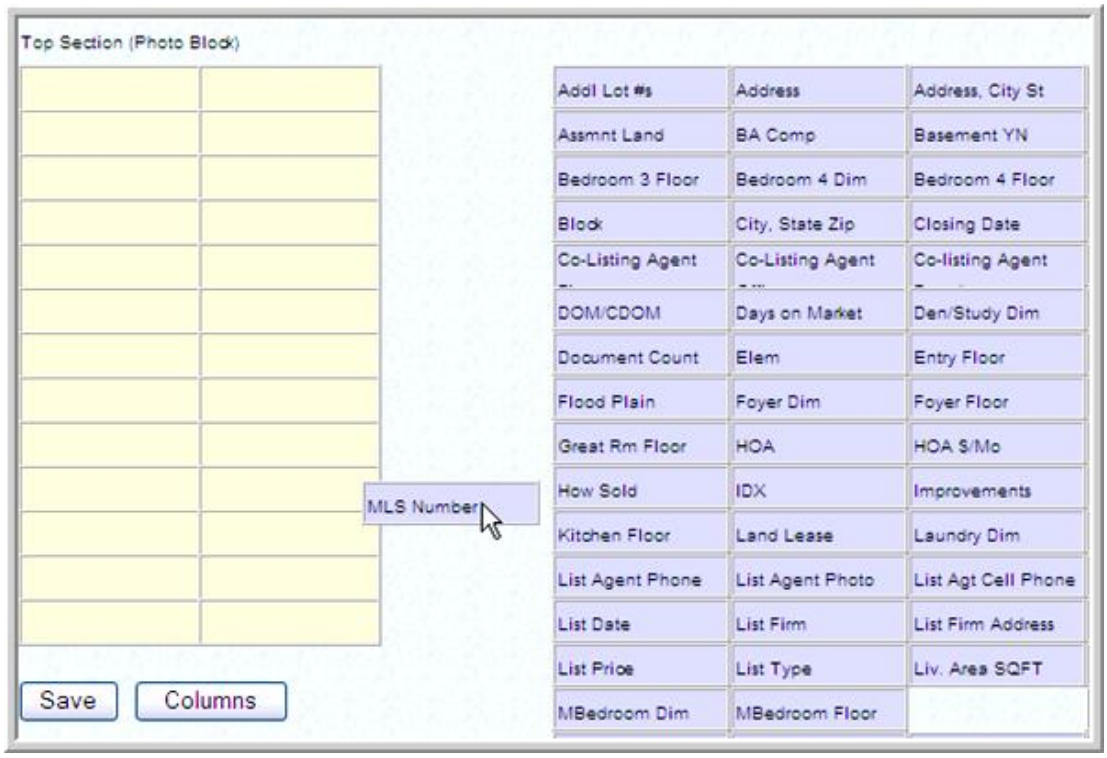
When you return to the "Display Components" page, you will want to set up the layout of the section you have just added. Setting up the layout consists of selecting the fields that will be seen in that section, as well as setting the properties for each field.

Highlight the section, then click "Layout".



The Layout Page

Click on the field you want to include, then drag it to the particular cell where you want it to be located.



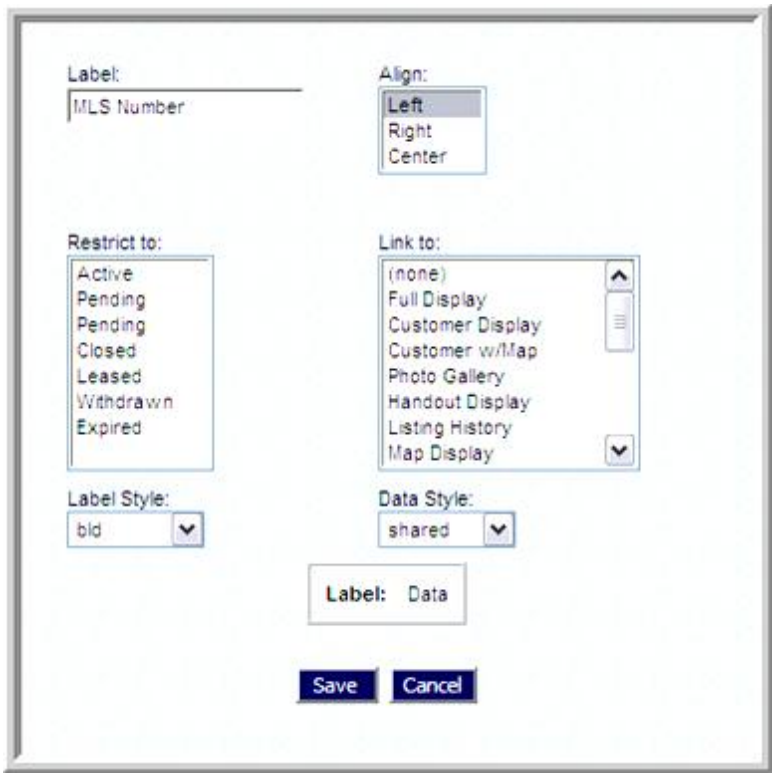
Double-click on any field for which you wish to change the properties.

Properties of Individual Fields

Label: You can modify the title of the field in your detail display.

Restrict to: Allows you to restrict fields to show up only for the statuses you have selected.

Label Style: Select the font style you would like to use for the labels of each field. An example of how the style looks appears just above the 'Save' button.



Align: Select to have fields align either left, center, or right on the display.

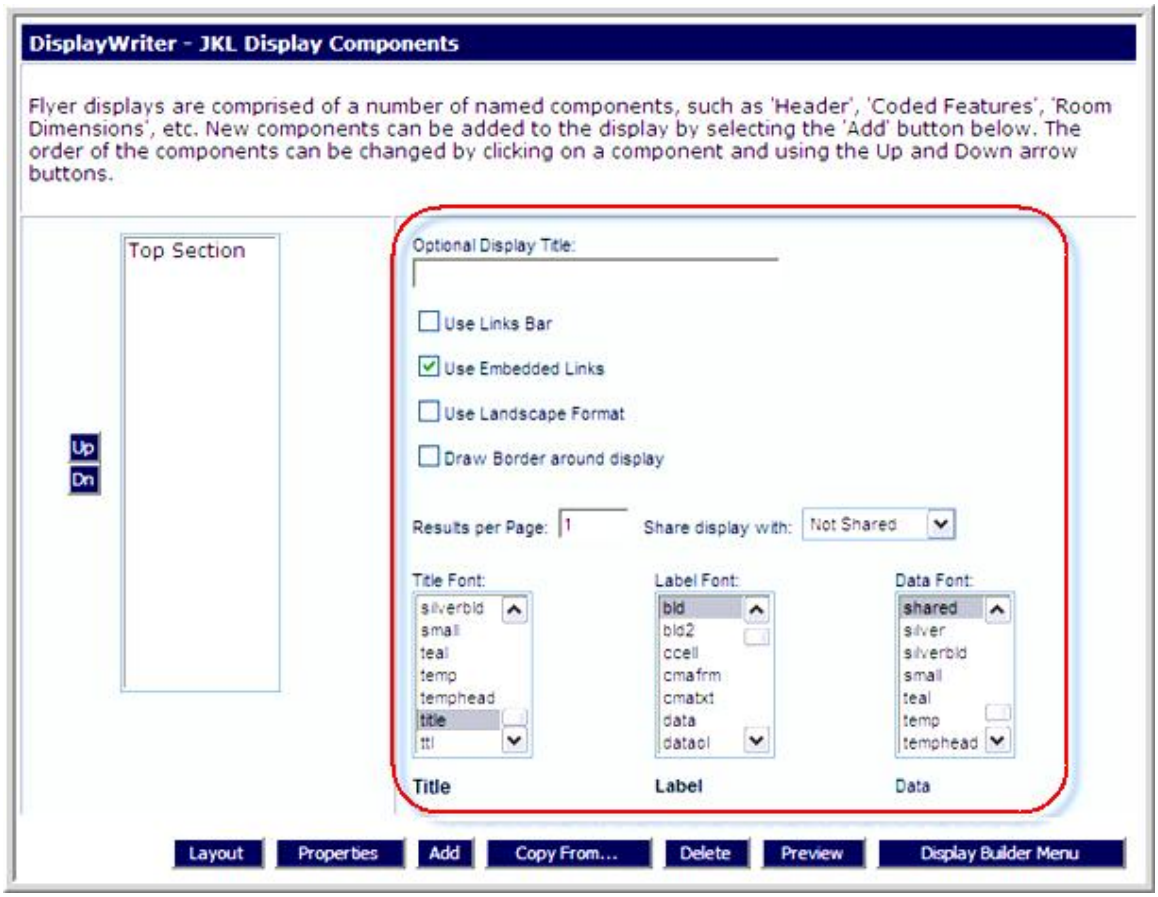
Link to: Allows you to select a display to link to with the field you have chosen.

Data Style: Select the font style you would like to use for the labels of each field. An example of how the style looks, appears just above the 'Save button.

Click on "Save" after you have made your selections in the "Properties" window.

Note: Once you have finished customizing a section, repeat these steps to add any other sections you want to include in your display.

Make any other desired selections for your detail display on the "Display Writer" screen. Options are described on the following page.



Optional Display Title: Allows you to type a short header at the top of each printed page.

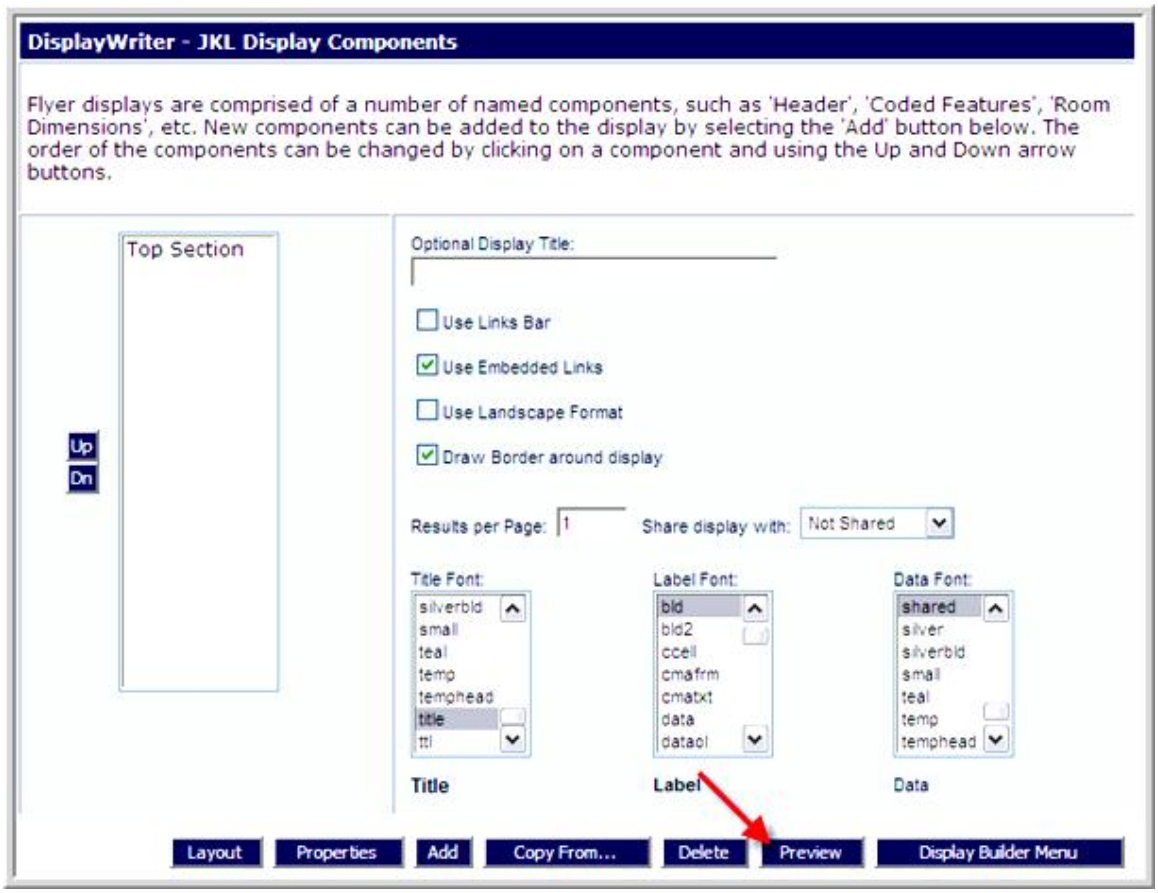
Use Landscape Format: If your detail display does not fit on an 8" × 11" page, you can check this option to display it in a 'Landscape' format.

Use Embedded Links: In order for the fields you have chosen to link to other displays, you must have this box checked.

Fonts: You can choose the fonts for the title of the display, the label, and the data. Highlight the font you would like to use for each item. A preview is available for each type, displayed below the choice lists.

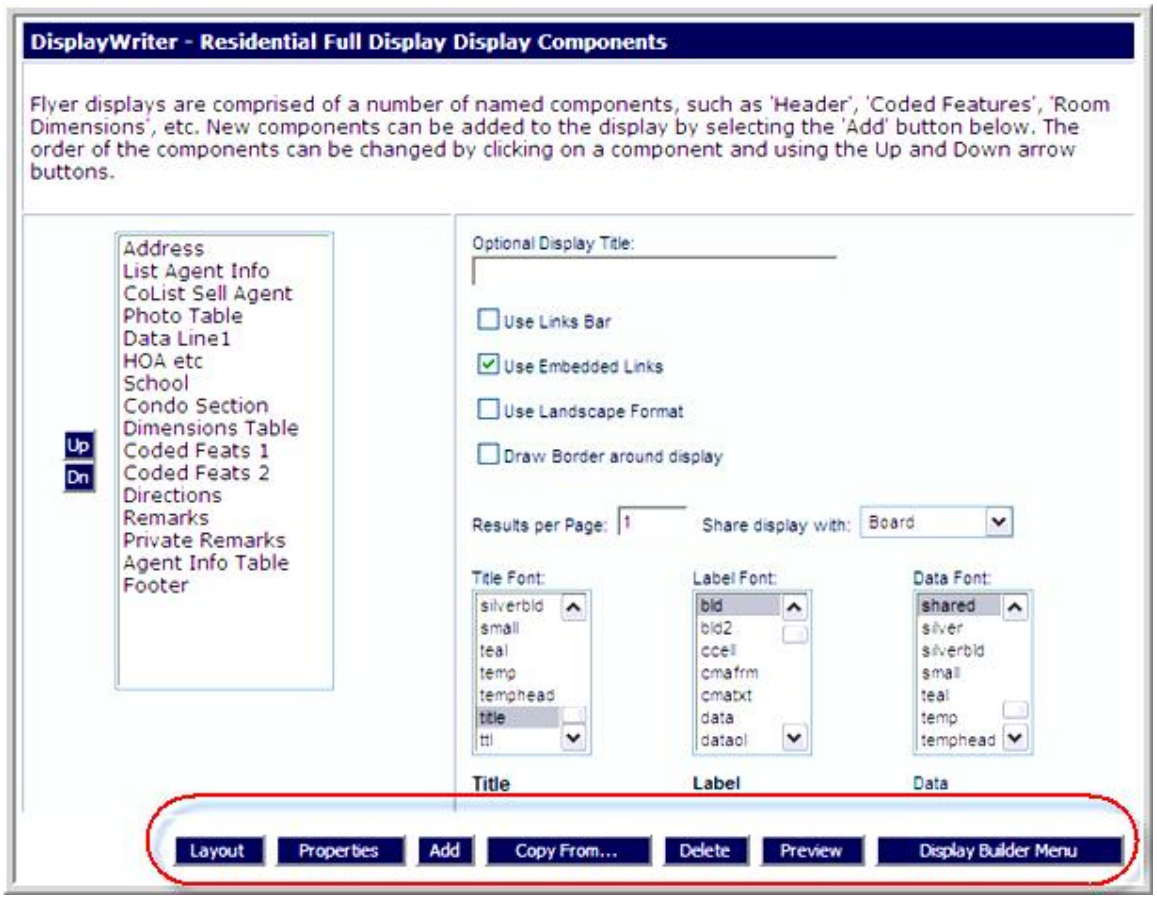
Share Display With: You have the ability to share your display with other agents in your office. Once shared, the other agents will need to copy the display into their custom displays.

Preview your display.



Click "Return" after previewing your display. Once you have previewed the display and click "Return", your display has been SAVED.

Other Options for the Detailed Display



Properties: Allows you to adjust the number of columns and rows for the highlighted section.

Display Builder Menu: Returns you to the first page in Online Display Builder

Copy From: You can select a previously created section from another display built by other users.

Delete: Allows you to delete the highlighted section from the display.

Cloning and Copying From Existing Displays

You have the ability to clone or copy from existing **custom** displays. The "Clone Existing" option allows you to choose an existing custom display from other agents in your firm. Once you have chosen that display, you will be able to edit it and use that display as one of your own custom displays.

The "Copy From" option is found when you create a detail display. This option allows you to copy a section that you or other agents have built.

Cloning Existing Displays

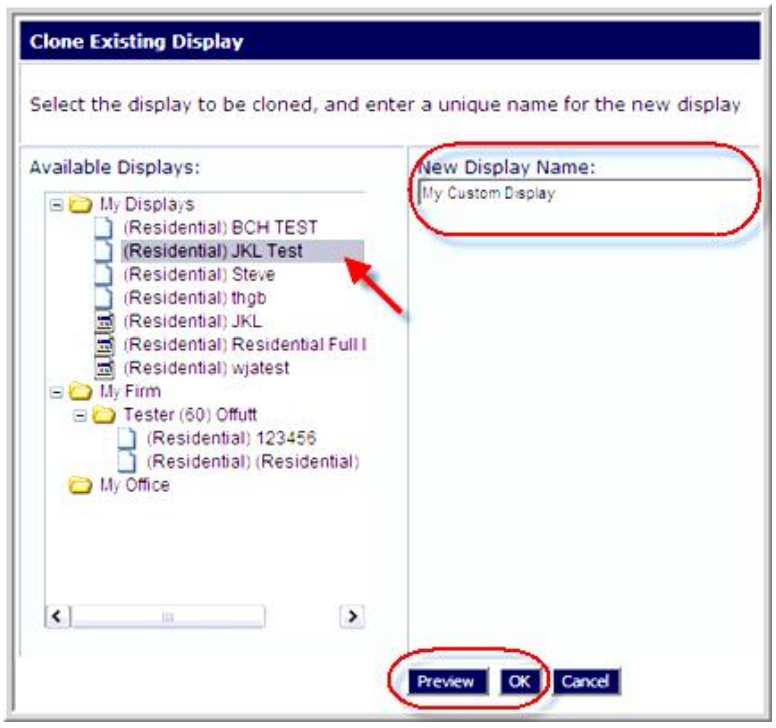
From the "Custom Display Manager" page, click on "Clone Existing".

Select the display you wish to clone from the "Available Displays" list.

Create a New Display Name.

Preview the Display.

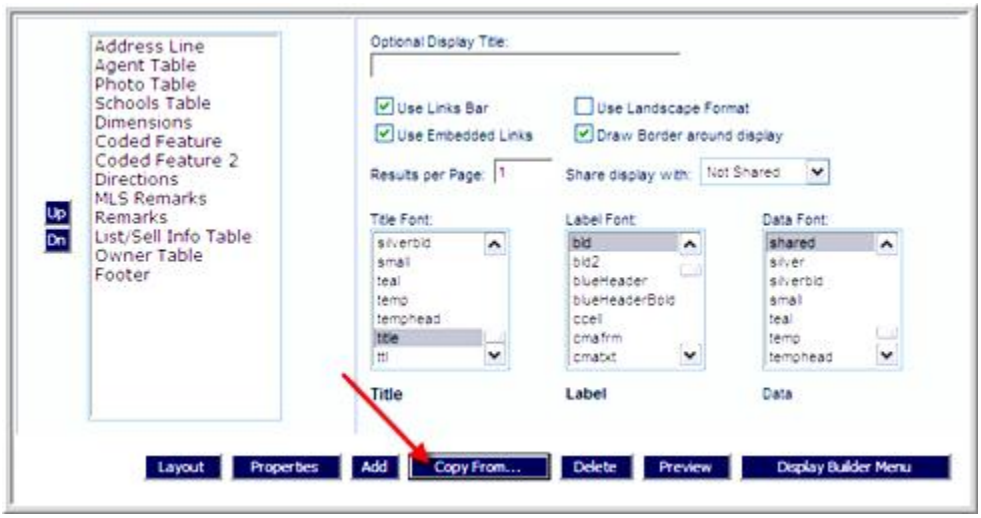
Click "OK".



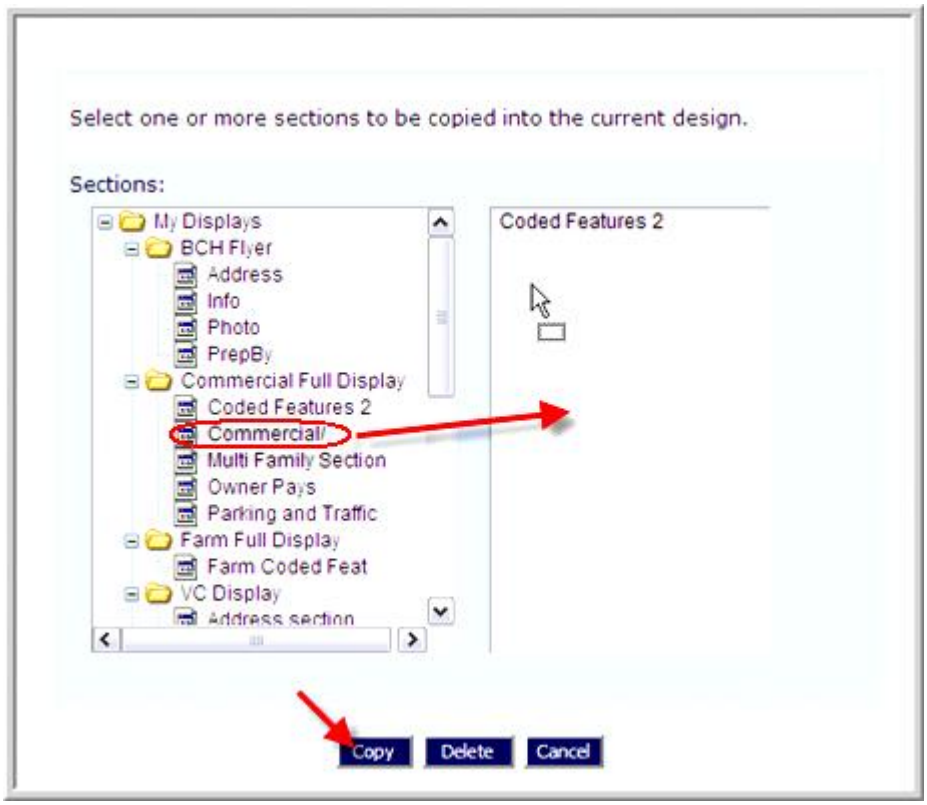
Copying From Existing Displays

When building a detail display, you can copy from sections of existing custom displays built by yourself or other agents in your firm.

From the "Detail Display Components" page, click on "Copy From".



Click and drag the section you would like to copy to your display, from the left to the right. Then click on "Copy".



Adding Displays to InnoVia

To include the displays you have created into the display choices of InnoVia™, you will need to go into "Display Preferences". From "Display Preferences" you will be able to include your custom displays, as well as suppress other displays in InnoVia™ that you may not use. You can also set your custom display as the default display.

Click on "Search", then click on "Display Preferences".

Select the property type you would like to work with.

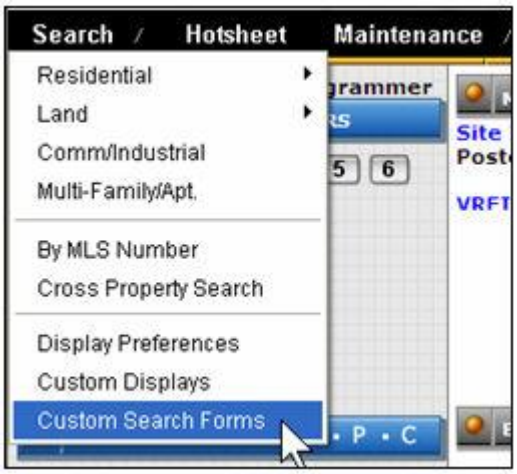
Check or uncheck the box to the right of the displays to select whether or not you would like to include the display in your display choice list.

Select the display you would like to have as your default display by clicking the "radio" button next to the display name. Click on "Save" to exit.

Custom Search Forms

Each property type search screen in InnoVia has a set number of search fields designed with a standard format for all InnoVia users. Using the **Custom Search Forms** option, you can build your own search screens for each property type, giving you control over which fields are included, and the location of those fields on the screen. If you don't like where a certain field is located on the standard search screen, simply build your own search screen.

The **Custom Search Forms** option is located under the **Search** menu.



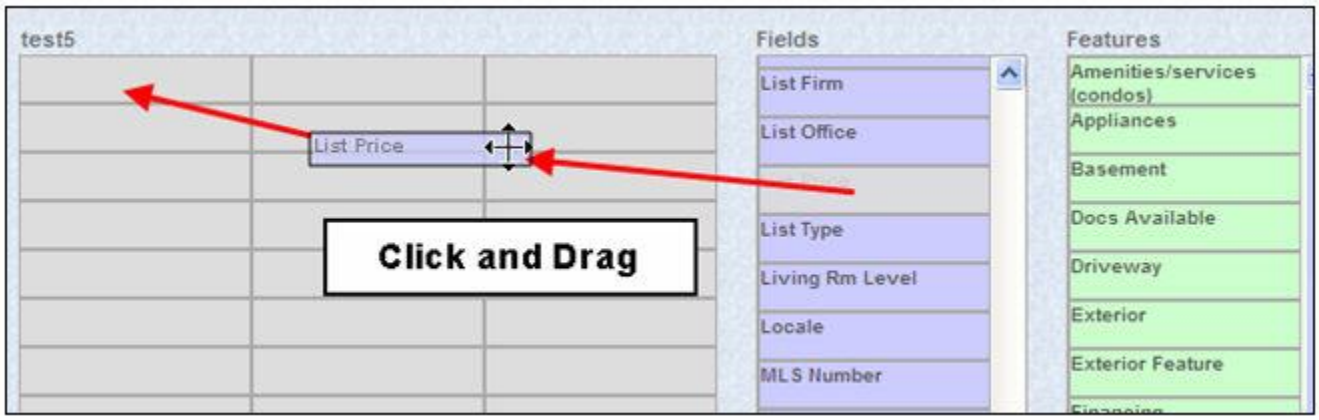
Custom Search Form Manager

From the Custom Search Form Manager, you can:

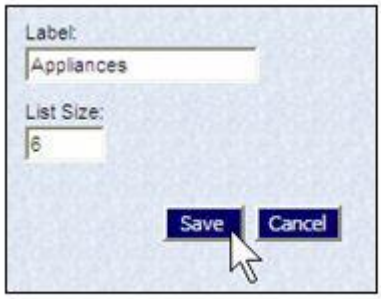
- Select a Search Type to view your existing custom search forms
- Click "New" to create a new custom search form
- Delete, Rename, or Edit an existing custom search form

Creating a New Custom Search Form

- Click **New**
- Give your search form a name, something you will recognize from the Search menu in InnoVia.
- Choose the appropriate Search Type and click **Next**
- You will see three sections. The gray area on the left is your custom search form. The two scrolling areas on the right are the list of fields you can use on your search form, including the basic data fields and the coded features.
- Simply find the field you want to use in the list, click and drag the colored block, and drop it in the preferred area on the custom search form. Add as many fields as you would like.



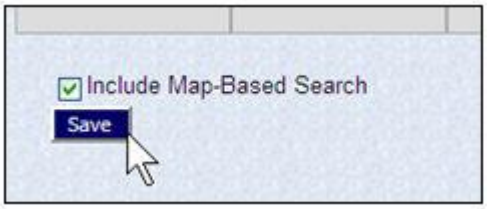
- You can ***double-click*** on any field block to edit properties for that field. For the basic fields you can change the label. For the coded features, you can change the label and the list size. The list size equals the number of selections that will be visible in that field without needing to scroll down.



Example: **List Size = 6**

List Size = 3

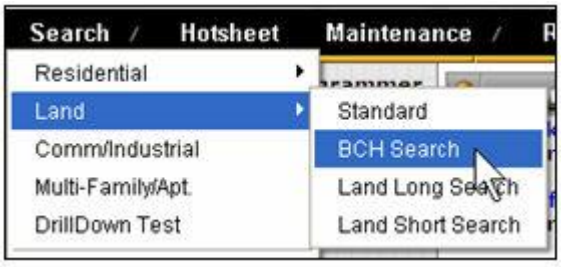
- There is also an option at the bottom to include the Map-Based Search option on your custom search form, giving the ability to search a specific geographic location on the map.



- When your form is complete, click **Save** at the bottom.

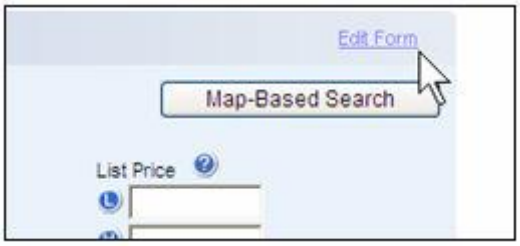
Using a Custom Search Form

To use your custom search form, click the Search menu from the menu bar, and hover your pointer over the appropriate property type. A sub-menu will load where you can select a custom search form or InnoVia's standard search form.



Use your custom search form like any other InnoVia search page.

There is also an **Edit Form** link in the upper right corner of the search form that will take you directly to the editing page so you can make changes if necessary.



Note on Saved Searches
You can save and retrieve searches on custom search forms, just as you can from the standard search pages. However, if you load one of your saved searches onto a custom search form, and that form does not include one or more of the fields for the saved search criteria, that criteria will simply be left out of the search. The search will only include criteria that have loaded and are visible on the search form.

Troubleshooting – Error Messages

Page Cannot Be Displayed

If you encounter the "Page Can not be Displayed" message when attempting to get into InnoVia™, try the following steps:

Check to make sure you are connected to the Internet by going to another website. It is best to try to go to a website you have not been to recently, perhaps www.getoffutt.com. If you cannot get to that website either, you may not be connected to the Internet. It might be wise to restart your computer and try again from the beginning.

If you can get to other websites without problems, try a different computer, or call someone to try it on their computer. If neither computer can get to the website, and you are certain that you are connected to the Internet, call MarketLinx immediately at 1-800-334-0831. If it is after hours, stay on the line for the emergency voicemail box.

If your computer is the only one that cannot get to InnoVia try clearing cache, cookies and history.

Error On Page/JavaScript Errors

If you are getting JavaScript errors, or are continuously asked if you wish to "debug", follow these steps:

- In Internet Explorer, go to "Tools", then "Internet Options".
- Click the "Advanced" tab.
- Check the box to "Disable Script Debugging".
- Uncheck the box to "Display notification about every Script Error".

If you use Norton Internet Security:

- Disable Norton Internet Security.
- Clear Cache and Cookies.
- Try search again.
- Re-enable Norton Internet Security.

If neither of these steps works for you, you may want to check your popup blocker settings.

Warning: Page Has Expired

The primary reason this particular message appears in InnoVia™ is that agents do not allow the pages to load completely before moving on to something else. For example, when searching for listings, users will click the "Printer Friendly" button from the Matches Found box. Then **before the page of one liners completely loads**, they begin clicking MLS numbers. Once they hit the "Back" button to return to the one liners, this message occurs.

You should allow the one-liners to finish loading (the green status bar at the bottom of the screen should note that the page has loaded) **before** clicking any MLS numbers. Also, keep an eye on the scroll bar on the right side. Wait for it to stop moving before clicking on any MLS numbers.

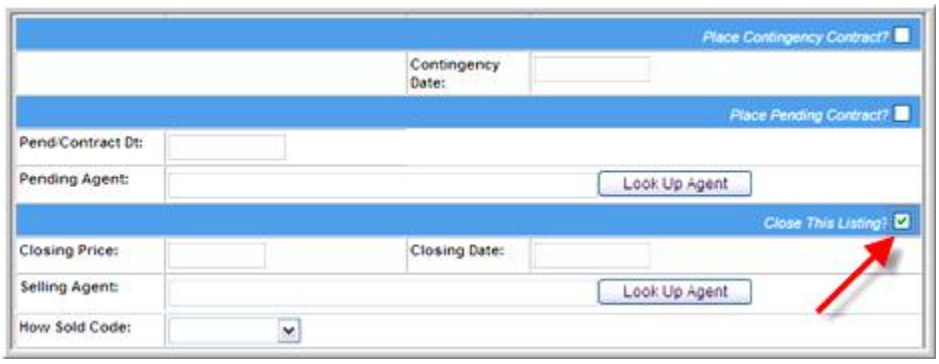
It may also be beneficial to you to check the Required Settings for InnoVia to make sure that all of your Internet Explorer settings are correct.

"DB_doins" errors

"DB_doins" errors are generally a programming issue that should be reported to Customer Support for correction. Sometimes they will prevent you from saving a listing, however, so it is important that you click the "Back" button from this error, and then click "Save Partial" so that your work is not lost.

Please Check Appropriate Box to Enable Changes

In order to make status changes, price changes or expiration date changes, you must first check the appropriate box at the top right corner of the correct section of the maintenance screen.



This Item Is Mandatory

There are certain fields on the listing input screen that are mandatory. You will not be able to save a new listing unless all of the mandatory fields have been entered. If you get the "This item is mandatory" message on your screen when trying to save a listing, just click the "OK" button, and the system will move your cursor to the appropriate area for you to fill in the required information and finish your listing.

If you do not have the correct information available to you at the moment, you should **save the listing as a partial listing**, and complete the listing when the information becomes available.

Rule Constraint Error

There are certain rules that apply to listings that are of particular statuses. For instance, you are not allowed to extend an expiration date on a listing that is already expired. You should first place the listing "Back On Market" before extending the expiration date. You are not allowed to place an expired listing in Pending status. You must first make the listing Active before you can make it Pending. If you have concerns or questions about these rules, or if you receive the "Unable to complete due to rules constraints" error, please call your board office to find out what the rule is concerning that particular function.

You Are No Longer Logged In

There are a few reasons why you may be getting the "You are no longer logged In" error:

- **You might actually be no longer logged in**

You might actually be logged out of the system, but getting logged out of the system is more rare than some people think. You have a time limit on the system before InnoVia™ logs you out. Activity is considered to be moving from screen to screen, typing, clicking with your mouse, or using any of the gray command buttons on the left side of the screen.

If you are actually using InnoVia, a warning will display at the bottom before we log you out that will allow you to click "Refresh Session" to keep from getting logged out. This warning does include an audible notification, so make sure the volume on your computer is turned up if you leave your desk very often.

We strongly recommend that if you have to get up from the computer while entering a new listing, that you make sure to **save the listing as a partial** so your work is not lost.

- **You may have incorrectly set your favorite or desktop shortcut**

If you are getting the "No Longer Logged In" message when clicking the links on the My InnoVia™ page, you are probably using a shortcut or favorite that was incorrectly saved or for some reason has stopped working correctly.

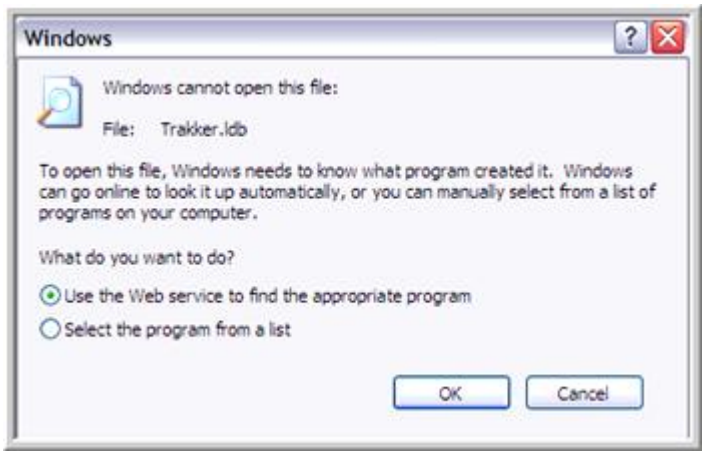
1. Close Internet Explorer.
2. Clear the cache and cookies by clicking on Start, Control Panel, then Internet Options.
3. After clearing the cache and cookies, open Internet Explorer again.
4. Click in the address bar so that it is highlighted.
5. TYPE IN the correct web address for your Board of Realtors.
6. When you get to the login page, either save the login page as a favorite, or right click on an open area, and then click on "Create Shortcut".
7. If the computer asks if you would like to replace the old favorite or shortcut, click on "Yes".

- **You may be using a Pop-up Blocker that interferes with InnoVia**

- **Any disconnection in internet service will also log you out.** You will not get the notification that you are about to be logged out if you lose your internet connection. This sometimes happens on dial-up connections and even on High Speed DSL connections, as it is subject to any interruptions in the phone line.

Windows Cannot Open This File

Whenever you try to open one of the Standard Forms in InnoVia, or create a Comprehensive CMA, your computer looks for Adobe Reader to open the file. If Adobe Reader is not installed, you will see the following message: "Windows cannot open this file"


Windows
Windows cannot open this file:
File: Trakker.ldb
To open this file, Windows needs to know what program created it. Windows can go online to look it up automatically, or you can manually select from a list of programs on your computer.
What do you want to do?
Use the Web service to find the appropriate program
Select the program from a list
OK
Cancel

You may also get the "Windows cannot open this File" error if:

- You have attempted to use the "Spreadsheet View" in InnoVia, and do not have a spreadsheet program (Microsoft Excel) installed on your computer.

- You have downloaded listing data (ASCII, MS Friendly, Agent Download), and double-clicked on the resulting file. In these cases, you may indeed have Microsoft Excel, but you need to open Microsoft Excel FIRST, and browse out to the file from inside the program.

Troubleshooting – Common Problems

InnoVia Menu Bar Does Not Appear

If the InnoVia menu bar or banner is missing from your computer screen, go to the Sun Java website at www.java.com.

If you have the Top Producer software on your computer, please do not follow these directions. Instead, call 1-800-334-0831 for help.

- Once at the Java website, click on the 'Manual Download' link on the left side of the page.
- On the next page, click on "Download" button for the Windows Offline Installation (the second Download button from the top).
- When the File Download box appears, click on "Save", and save the file to your desktop.
- After the file has been downloaded to your computer, locate the file and double click it to begin the installation.
- Once the install is complete, close all open programs, restart your computer, and try InnoVia again.

How to Clear your Cache: Internet Explorer (Temporary Internet Files)

There are many problems in InnoVia that can be resolved by clearing your cache, or temporary Internet files. Among the issues for which we recommend clearing cache are the following:

- "Page cannot be displayed"
- Pictures not appearing for listings that are known to have pictures that were uploaded at least 2 hours prior
- Search, Save buttons “not doing anything”
- Graphics not appearing, or appearing distorted
- Changes made to Listings not appearing on Displays
- Can’t get to website
- JavaScript errors
- Missing buttons, enlarged pop-ups
- Automatic minimizing of pop-ups
- Pop-ups (matches found, save prospect, logout warning) not appearing
- Unusual occurrences of any kind during normal activity

To clear cache, follow the directions below:

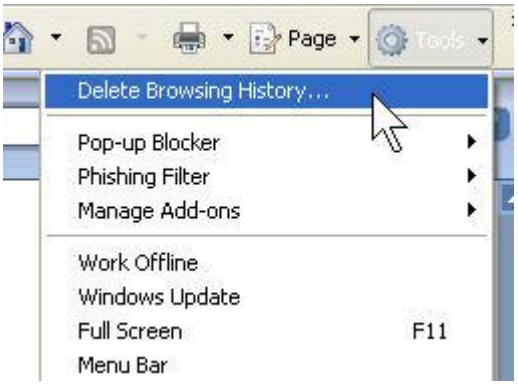
Internet Explorer 6

Click “Tools”, then “Internet Options”

Under the "Temporary Internet Files" section, click the “Delete Files” button

Internet Explorer 7

Click “Tools”, then “Delete Browsing History”



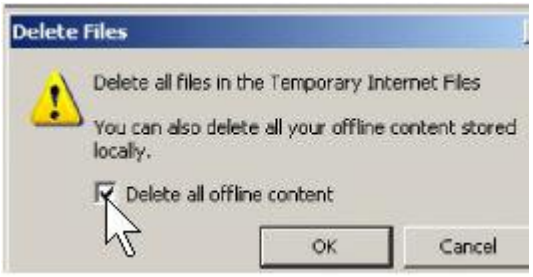
Then click the "Delete Files" button in the "Temporary Internet Files" section

Use Current
Use Default
Use Blank
Temporary Internet files
Pages you view on the Internet are stored in a special folder for quick viewing later.
Delete Cookies...
Delete Files...
Settings...
History
The History folder contains links to pages you've visited, for quick access to recently viewed pages.

Delete Browsing History
Temporary Internet Files
Copies of webpages, images, and media that are saved for faster viewing.
Delete files...
Cookies
Files stored on your computer by websites to save preferences such as login information.
Delete cookies...
History
List of websites you have visited.
Delete history...

A pop-up confirmation box will appear. Place a check in the box beside “Delete all offline content” and click “OK”.

Click "Yes" from the confirmation message.


Delete Files
Delete all files in the Temporary Internet Files
You can also delete all your offline content stored locally.
Delete all offline content
OK
Cancel

Click “OK” to close the “Internet Options” screen.

Once the files have been deleted, click "Close" to exit.

Form data
Saved information that you have typed into forms.
Delete forms...
Passwords
Passwords that are automatically filled in when you log on to a website you've previously visited.
Delete passwords...
About deleting browsing history
Delete all...
Close

Try InnoVia again. If you are having the same problem you were having before, contact Customer Support for further assistance.

Emails Not Being Received

If you encounter problems receiving or sending emails using the InnoVia™ system, there could be any number of causes, depending on which program you use to send and receive your email.

First, we strongly recommend that you use Microsoft Outlook or Outlook Express to check your email, if you currently use web-based email. Your Internet Service Provider most likely has a tech support team that can explain the differences and walk you through setting up and using Outlook or Outlook Express.

The reason we recommend the use of Outlook or Outlook Express is that these programs will increase the reliability of email-based communications where InnoVia™ is concerned. It should ALWAYS be your first choice to use the "My Email" button in InnoVia™, rather than the "Send it" button.

Several Users have also reported problems with emails if they have Norton Internet Security installed, or some other "Anti-Spam" software. To configure Norton Internet Security to allow emails from InnoVia:

- Open the “Norton Anti-Spam” folder from the email program.
- Highlight the messages that should not be considered spam.
- At the top, using the Norton Anti-Spam icon, select “This is not Spam”.

Pictures not Appearing on Listings

If you uploaded the pictures to your listings and they are not showing:

- Make sure that you received a confirmation message informing you that the upload was successful to that listing.
- You may need to clear your cache and cookies (refer to the “How to Clear Cache and Cookies” section of the manual for instructions). Once your cache and cookies have been cleared, view the listing display again.

If you received an error message when you clicked on “Upload”:

- Make sure each picture **fits the size requirement for your board**.
- The pictures must be saved in **JPG format** before uploading the pictures.

Can’t See Entire Screen – Screen Resolution

It is recommended that you set your monitor to a screen resolution of **1024 x 768** or higher when using InnoVia™. This will allow you to see the entire screen, without the need to scroll up and down or back and forth. To do so:

- From your desktop, right click in a blank area and select “Properties”
- Click on the “Settings” tab from the Display Properties window
- Click and drag the Screen Resolution slide bar, until it reads 1024 x 768
- Click “Apply” and “OK”

Your screen should reset to the new screen resolution.

Note: This is not a requirement to use InnoVia™, only a recommendation. Leaving it set to a lower screen resolution will make the print on the screen larger, but will require you to scroll in the window to see everything.

Issues With Pop-up Windows

If you are experiencing the following issues with pop-up windows:

- Pop-ups not appearing
- Automatic minimizing of pop-ups
- Enlarged pop-ups

You will need to check the settings of your pop-up blocking software to make sure that it is set to allow pop-ups on the InnoVia web site. It is possible to have more than one pop-up blocking program on your computer.

Refer to the Help Topics section of the InnoVia™ website for instructions on how to set your pop-up blocking software to allow pop-ups in InnoVia™.

Website Toolbars:

If you have a website toolbar on your browser (MSN, Google, and Yahoo all provide toolbars), it probably contains pop-up blocking software. To allow pop-ups within InnoVia, click the "Pop-ups Blocked" button on the toolbar. From that point forward, the button will read "Pop-Ups Allowed" when you are in InnoVia™.

Listings Not Printing on One Page:

If your InnoVia™ displays are printing on two pages, you may need to change your margin settings in Internet Explorer. To do so:

- Go to "File" and "Page Setup" while in Internet Explorer
- At the bottom of the window that appears, reduce your margins to .5 (half inch) or less for all 4 sides of the page.

This should prevent those larger displays from spilling over onto a second page when printing from InnoVia™. You may also want to delete the header and footer from that same screen. Simply click in the corresponding field and delete the text. This will prevent things such as the web address (&u) from being printed in the header and/or footer, as a result, leaving more room and cleaning up the printout a little.

For other required settings check out the Login Page of your MLS system. Click on the "**Click Here for Required InnoVia Settings**" link.

Support Options

There are numerous ways by which you can receive support for your InnoVia™ System. As your first resource, please access the “Help” section of your “My InnoVia™” page, and the “Help” buttons on every InnoVia™ screen.

These sections of InnoVia™ will guide you through troubleshooting some of the more common InnoVia™ problems. On the back cover of this book is a complete list of support communication options.

Send Comments to MarketLinx

Questions, concerns or comments about InnoVia™, can be e-mailed to MarketLinx Customer Service Department from within the system by clicking on “Send Comments to MarketLinx” under the “MISC” tab.

Simply enter your information on the form and click the SEND button.

Send Comments To Offutt Systems, Inc.
Please feel free to contact OSI with any questions or comments you have regarding the InnoVia Internet MLS system. To comment on other OSI products, please visit our web site GetOffutt.Com. Please be as specific as possible regarding the nature of your concern. The more detail, the better!
When complete, click the SEND button near the bottom of this page. Thank you for your time.
Name:
Email Address:
Phone Number:
Area of concern:
General Information
Contact Method: Phone E-Mail
Please enter your comments here:
Send
Reset

MarketLinx Support Contact Info

Email - InnoviaSupport@marketlinx.com
Phone - (800) 334-0831
Fax - (336) 547-2723